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ABSTRACT

The junior high school curriculum was designed to serve the dual purposes of career development and occupational exploration in marketing and distribution. The guide contains: a field-test summary, detailed introduction to the teacher (including purposes, outcomes and goals, instructional strategies, structure of the curriculum, the conceptual framework, implementation, content overview, teacher qualifications, and student evaluation), suggestions for introducing the curriculum to students, and a 76-term glossary. The total curriculum consists of 16 units, each with several activities which will take from one to five class periods to complete. The units cover career planning topics and exploratory experiences in areas of marketing and distribution. Each unit consists of a Teacher's Guide and Student Materials. The Teacher's Guides are organized as follows: an overview, objectives, rationale, and concepts are presented followed by activity descriptions which include sections on introducing the activity, guiding the activity, learning more from the activity, and points to stress. Performance criteria and resources and references are also presented for the units. The Student Materials, corresponding to the activities for each unit, contain an overview and the necessary materials for each activity such as instructions, forms, brief readings, and matching exercises. (Author/MS)

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Career Exploration in Marketing and Distribution

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FOREWORD

These curriculum materials are designed to enable students to explore career opportunities in marketing and distribution. Funded under Contract #OEC-0-73-5233, by the Curriculum Development Branch, Bureau of Occupational and Adult Education, the project which resulted in these materials and its companion, **Conceptual Framework**, formed part of a larger wave of curriculum development in career education. The results of these efforts, known as the "cluster" projects because they are organized for groups of related occupations, provide vehicles for educators to develop the career potential of students.

The units which comprise this curriculum serve the twin goals of developing career decision-making skills and providing opportunities for adolescents to "try on" marketing and distribution occupations. The units, though packaged as one set of materials, actually form two curricula which serve the two goals in different proportions.

The *overview sequence* focuses on developing career decision-making skills and exercises their application on marketing and distribution principles and occupations. It seeks a basic outcome of exploratory activities: the decision to pursue or reject further study of the field.

The *in-depth sequence* is targeted at adolescents with previous experience in career exploration who have decided to pursue the field further. It emphasizes marketing and distribution principles, occupations and skills in a career decision-making framework. It is designed to assist students in developing career plans, acquiring skills in marketing and distribution, and in continuing career exploration.

Both of these curriculum sequences were field-tested with junior high school students. However, the units may also be combined in a variety of ways. The widespread applicability of the materials to different grade levels, subject areas, school settings and purposes was reiterated by participants in a National Conference on Career Education in Marketing and Distribution held in Boston, Massachusetts in August, 1975. Over 100 educators, from many segments of the educational community, spent two days actually using the materials as if they were students, then critiquing them from their own perspectives. Enthusiastic support for the philosophy, content, instructional strategies and substance was offered.

Most important, the educators who endorsed dissemination of this curriculum share in the fundamental commitment it serves – that career development is an ongoing, lifelong process which a dynamic educational system must foster.

Completion of these curriculum materials for Career Exploration in Marketing and Distribution represents the culmination of a long, arduous and gratifying work experience over the past two and one-half years; preparation of the acknowledgements is one of its most savory rewards.

Contributors to the curricula are legion. Participants in the National Conference and in the field test left their collective stamp on the materials through honest and valuable critique and creative recommendations.

The Advisory Panel to the project team brought experience and enthusiasm to the development effort. Each, from a different perspective, provided support for the philosophy, strategy, substance and methods of the curricula. From Panel members representing the Distributive Education community – Vivien K. Ely, Mary K. Klaurens, Kenneth A. MacLaren and Paul Bennewitz – came support which places these materials in proper relation to secondary and postsecondary marketing and distribution education. In addition, Arnold Lanni and Walter DeVine of the Arlington, Massachusetts, Public Schools, reviewed the materials from the points of view of elementary education and guidance, respectively.

The authors functioned as part of a larger project team, members of which deserve credit for their special contributions. Fred Levy, a marketing specialist, assisted in the design. Ann Reed, who may know every page by heart, nursed the materials through reams of draft, until the last typo was gone.

Barbara Boris, Kelly Gerry and Kathy Lemire–pillars of the production staff–did not perceptibly flinch at the schedule, the volume, or the condition of the draft, which they converted into perfect copy.

The initiative for this project came from the U.S. Office of Education. During its first year, Dr. Elizabeth Simpson, as Project Officer, provided support and encouragement. Mary V. Marks, Chief of the Curriculum Development Branch, and Project Officer assisted the project whenever called upon, and insured its completion and distribution.

Throughout the project, insight, direction and support were unfailingly provided by Ed Nelson, U.S.O.E. Project Monitor. From the first page to the last, the stimulus for this product came from this source.

Alice K. Gordon
Project Director
October 1975

Field-Test Summary

Field-testing in actual classroom settings is an important phase in the development of viable and effective curriculum materials. The original version of these materials was field-tested in seven schools in three states during 1974-1975.

Two sequences of units were field-tested:

- a brief, eight-week overview exploration curriculum for young junior high school students, infused into their regular curricula. The units tested were the original versions of Units 1-9 presented here.
- an in-depth exploration curriculum for advanced junior high school students, taught over the period of a semester, generally as a discrete course. The units tested were the original versions of Units 10-16 plus Unit 4 presented here.

Each of the sequences was tested in each of the three states: in Chesterfield County, and Richmond, Virginia; Toledo, Ohio; and Rockland, Massachusetts. The overview materials were used in heterogeneous classes, sixth through eighth grades. The in-depth materials were utilized in heterogeneous classes, eighth and ninth grades.

The curricula were tested in settings of individual and team teaching. The 10 participating teachers had diverse backgrounds, which included Social Studies, English, Mathematics, Science, Art and Distributive Education.

The field test indicated that:

- On the whole, the materials were both usable and appealing to teachers and students.
- Students learned career development concepts, as indicated in performance measures and teacher observations.
- Students became acquainted with marketing and distribution occupations, as indicated in performance measures and teacher observations.
- In the sites where control groups were available, students taking the curriculum demonstrated significant learning as indicated by performance measures.
- Teachers with background in marketing and distribution found it easier to teach and embellish the marketing and distribution content of the curriculum.
- Community exploration can be accomplished if determined effort is applied. Teachers organized field trips to interview workers at their places of business, sometimes transporting students in their own cars, before and after school hours.
- Teachers were especially enthusiastic about student-centered, active, participatory learning activities which embellished their own repertoire of teaching techniques.

A special feature of the field test included the participation of the field-test teachers in a National Conference on Career Education in Marketing and Distribution. During this time, they became familiar with the curriculum materials and methods for using them. This special training experience assisted teachers in applying the materials in their own classroom settings. Further assistance to teachers was provided by project staff during monthly visits.

Significant revisions to the original materials were based upon the recommendations of field-test teachers and on classroom observations made by project staff. Information for improving the materials was obtained from teachers' records of what they actually did in class, and how they and students reacted to the activities. In addition, project staff visited each school monthly over the five-month period of the field test, observed the curricula in action, and discussed progress with the teachers.

The key revisions resulting from the field test include:

- improved format of presentation, including specification of concepts; separation of teacher and student materials; addition of unit overviews;
- strengthening of the specific marketing and distribution content of the curriculum, especially in Units 7 and 12;
- addition of a glossary of important terms used in the curriculum;
- increased variation in the type of in-class activities;
- increased availability of materials by packaging the overview and in-depth exploration sequences in one cover;
- specific refinements of individual activities, including the simulation, Unit 6.

Credit for stimulating improvements in the curriculum materials belongs to the field-test participants. The authors wish to thank them all for their cooperation, enthusiasm, hard work and recommendations in sharing in the development of this curriculum.

Field Test Participants

	Curriculum
Richmond, Virginia	
Callie Stanley, Supervisor of Distributive Education Richmond City Schools	
Cheryl Tilley Teacher Coordinator, Distributive Education Binford School	7th grade Overview Exploration
Dennis Groome Distributive Education Teacher Albert Hill School	8th grade In-depth Exploration
Toledo, Ohio	
Roger Moser Principal, McKinley Junior High School	
Russell Brock Teacher Coordinator, Distributive Education DeVilbuss High School	9th grade In-depth Exploration
Jacqueline Wiles Teacher, McKinley Junior High School	7th and 8th grade Overview Exploration
Chesterfield County, Virginia	
Dr. William Clayborne Coordinator of Educational Planning Chesterfield County School Board	
Moira Edwards Falling Creek Middle School	6th grade Overview Exploration
George Heller Carver Middle School	8th grade In-depth Exploration
Rockland, Massachusetts	
Dr. Robert Levine, Principal Rockland Junior High School	8th grade Overview and In-depth Exploration
Peter Traveline, Team Leader	
Timothy Cullinane Donna Leahy Dan Gilligan	

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INTRODUCTION TO THE TEACHER

A. Purposes

This curriculum was designed to serve the twin purposes of career development, on the one hand, and occupational exploration in marketing and distribution on the other. Career development principles, applicable to any occupational field, constitute the foundation of the curriculum. They represent durable knowledge and skills which students may use throughout their lifetimes. Marketing and distribution occupations constitute the focus of the curriculum, to which career decision-making is applied.

The joining of career development principles to an occupational field is essential for effective exploration. To be meaningful to students, any occupational field must be studied in context of career decision-making. Similarly, career decision-making cannot be studied or practiced in the abstract but must be exercised on a career field. The questions "What is This?" and "Who am I?" are thus fused in the central inquiry of career exploration: "Is this field for me?"

Why career development? The major trend in American education to undertake responsibility for developing students' career potential responds to the recognition that career development is a lifelong process. Junior high school students are not too young for grooming for adult roles. They are already making decisions that will affect them as adults, such as educational decisions for vocational or college preparatory programs. Some have already entered the part-time work force. Explicit attention to career development assures that they do not make these decisions by default. Students, however, are not placed irrevocably on one career path or another. Rather they are introduced to concepts that will broaden their occupational horizons and decision-making skills for use throughout their lives. The focus is on the development and process of decision-making, not on the decision itself.

Why marketing and distribution? Marketing and distribution is one of fourteen vocational clusters organized by the U.S. Office of Education to describe groups of families of occupations. The occupations within this cluster are those which direct the flow of goods and services between producers and consumers. The marketing and distribution field is large and growing: one out of every five of your students will at one time or another be employed in it. Virtually every business employs individuals engaged in marketing and distribution functions. Many entry-level, part-time and summer jobs are available in the field; and therefore, it is especially relevant to young people. Furthermore, it has universal importance because every individual, as a consumer, has contact with persons working in these occupations.

Career exploration leads the individual to investigate many fields. In this curriculum, students focus on marketing and distribution but they learn and use tools which they can apply to exploration of any field or occupation. Exploration of all occupational fields should be available to students in the nation's schools.

How are career development principles and marketing and distribution integrated in this curriculum?

The dual emphasis of this curriculum is manifested in each unit, but the proportions shift. On the premise that the individual must first know something about him/herself and the process of career exploration, early units concentrate first on these generic topics. In accordance with the principle that the individual can only make career decisions intelligently if he/she understands the basic principles of and options in an occupational field, later units concentrate on marketing and distribution principles, processes, industries, functions and occupations.

The two foci appear in each unit of the curriculum. Where career decision-making is the principal objective of a unit, marketing and distribution occupations are used as examples in the student learning activities. Where knowledge of marketing and distribution is the principal objective, career development issues ask students to assess the suitability of the field for themselves.

This dual pattern may be traced in the sequence of units in this curriculum. The early ones emphasize career development issues, although the marketing and distribution field is used to provide the content for activities. For example, in Unit 2, students examine the importance of individual skills, interests and preferences in choosing a suitable occupation. The occupations used in the exercises are marketing and distribution jobs.

Later units of the curriculum provide a more intensive examination of marketing and distribution but career development issues continue to be important. For example, in Unit 11, students examine and practice the skills common to marketing and distribution occupations and, in so doing, learn more about themselves, their skills, interests and preferences. In addition, they learn an important factor in considering any field of work, i.e. the personal skills required.

The culminating activity of the curriculum sequence is the development of a career plan by each individual. This plan states career and occupational goals and alternative ways to achieve them. It serves as a synthesis of the knowledge, skills, and decisions students have acquired throughout the curriculum.

B. The Two Curricula: Outcomes and Goals

The emphasis of curriculum presentation in your classroom will depend upon the intensity of exploration suitable for your students' age and experience. For initial exploratory experiences, the career development emphasis may take priority. For later, in-depth exploration, marketing and distribution education may be more appropriate. Specific ways to construct the different sequences for different levels of exploration are discussed in section F, **Implementation of the Curriculum: Selecting Curriculum Units.**

The curriculum seeks two outcomes, or applications of these goals, depending upon the level of exploration which students engage in.

1. For early exploration students will make a career decision to pursue or reject further exploration in the field of marketing and distribution.
2. For in-depth exploration, students will develop a career plan in marketing and distribution.

To achieve these outcomes, both sequences share two goals:

1. Students will acquire career decision-making knowledge and skills.
2. Students will acquire knowledge of principles, industries, functions, occupations and characteristic skills in marketing and distribution.

C. Instructional Strategies

The curriculum is characterized by two broad types of instructional strategies:

- active, participatory in-class learning experiences
- community-based exploratory experiences

The curriculum units rely on active student participation in the learning process. Participatory learning is especially important here because career education, even more than other school subjects, is effective only if personalized to the individual student's interests. Further, skills are acquired most effectively when the learner participates in their acquisition. The activities in this curriculum are responsive to the need for student-centered learning. In-class activities include role-plays, a simulation, student presentations, games, and small-group exercises, tasks and discussion of all kinds. The kind of exercise chosen for each activity takes into account both the requirements of the content and the need to provide variation and stimulate interest in the format itself.

The curriculum is enriched by community-based exploration* activities which take students outside the classroom and into the community to observe, research and interview marketing and distribution employees and employers in their work settings. This approach offers students the opportunity not only for first-hand experience with the field but also the chance to interact with adults in the world of work.

If one characteristic of adolescence is salient, it is the importance and the difficulty of relating to the adult world on a meaningful level. Students of this age are beginning to develop and test their own identity and to seek role models for their future adulthood. On the one hand, this often creates the rejection of the adult world as a means of asserting independence from it; on the other, it induces experimentation with adult behavior.

The curriculum attempts to reduce this conflict by confronting it directly: offering students many opportunities to interact with adults in the world of work while at the same time requiring that they make their own decisions about alternative roles and routes.

By creating many community-based activities, the curriculum helps to bridge the educational and employment worlds.

D. Structure

The total curriculum consists of sixteen units, each comprised of several activities which will take from one to five class periods to complete. In this curriculum guide a unit is defined as a group of concepts and activities to convey a central principle or idea.

Each unit consists of a **Teacher's Guide** and **Student Materials**. The **Teacher's Guides** are organized as follows:

Overview: The cover page of each unit summarizes the student activities in the unit and the materials which students need to participate in them. Refer to **Student Materials** to identify those pages which should be duplicated and distributed to students.

Objectives: In the beginning of each unit, the student objectives to be achieved for the entire unit are explicated.

Rationale: This section explains why the unit objectives are important to career exploration, and the way in which the student learning activities will realize the objectives.

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*Specific suggestions for implementing community exploration are offered in Unit 13.

Concepts: Following the **Rationale**, concepts which are to be communicated in order to achieve the given objectives are given. This listing of concepts should assist the teacher in identifying major issues to be taught via student activities.

Activity descriptions contain several sections

Introducing the Activity:

Preceding each activity, points for classroom discussion are described. These discussion points introduce students to basic concepts necessary to participate in the activity.

Guiding the Activity:

For each student activity, instructions for classroom management and directions are provided. These instructions include: how to organize the students; directions to the students; and classroom layout; what kinds of student reactions to expect; notes about special requirements of the activity, and so forth.

Learning More From the Activity:

Suggested points for classroom discussion follow each student activity. These points or issues are designed to reinforce learning from a student activity. They generally fall into two categories: a) discussion of the results and/or progress of the activity; b) discussion of the points to be learned from the activity.

Points to Stress:

To further reinforce learning from a student activity, generalizations are highlighted.

Performance Criteria:

To determine whether students have achieved the objectives of the activity or set of activities, suggested performance criteria and measurement techniques are included. These may be oral or written exercises; often, they are observations and assessments of student performance in the activities themselves. In one unit (13), no performance criteria are included because the unit consists of suggested projects at the teacher's option and for further specification by the teacher.

Resources and References:

At the end of each unit is a listing of resources and references for use by the teacher or the student or both.

Student Materials

Student Materials for each unit accompany the **Teacher's Guide**. The **Student Materials** are organized by activity and presented as follows.

Overview: The cover page of each unit summarizes the student activities and the materials which students need to participate in them.

The **Overviews** are consistent with those in the **Teacher's Guide** to make it easy for the teacher to identify and match the appropriate student materials with teacher instructions outlined in the **Teacher's Guide**.

Note that some activities require no student materials.

Activity: The necessary materials for each activity, such as instructions, interview forms, profiles for role plays, brief readings in the form of Information Sheets, matching exercises, case studies, etc., are presented in the **Student Materials**.

If possible, duplicate a complete set of **Student Materials** for each student in the class. Note that the **Student Materials** are not a text but rather a resource for conducting student learning activities as presented in the Teacher's Guide.

Materials for the Simulation in Unit 6 appear in Master Form in the **Student Materials** and are already duplicated in a separate Simulation Packet which accompanies this Guide.

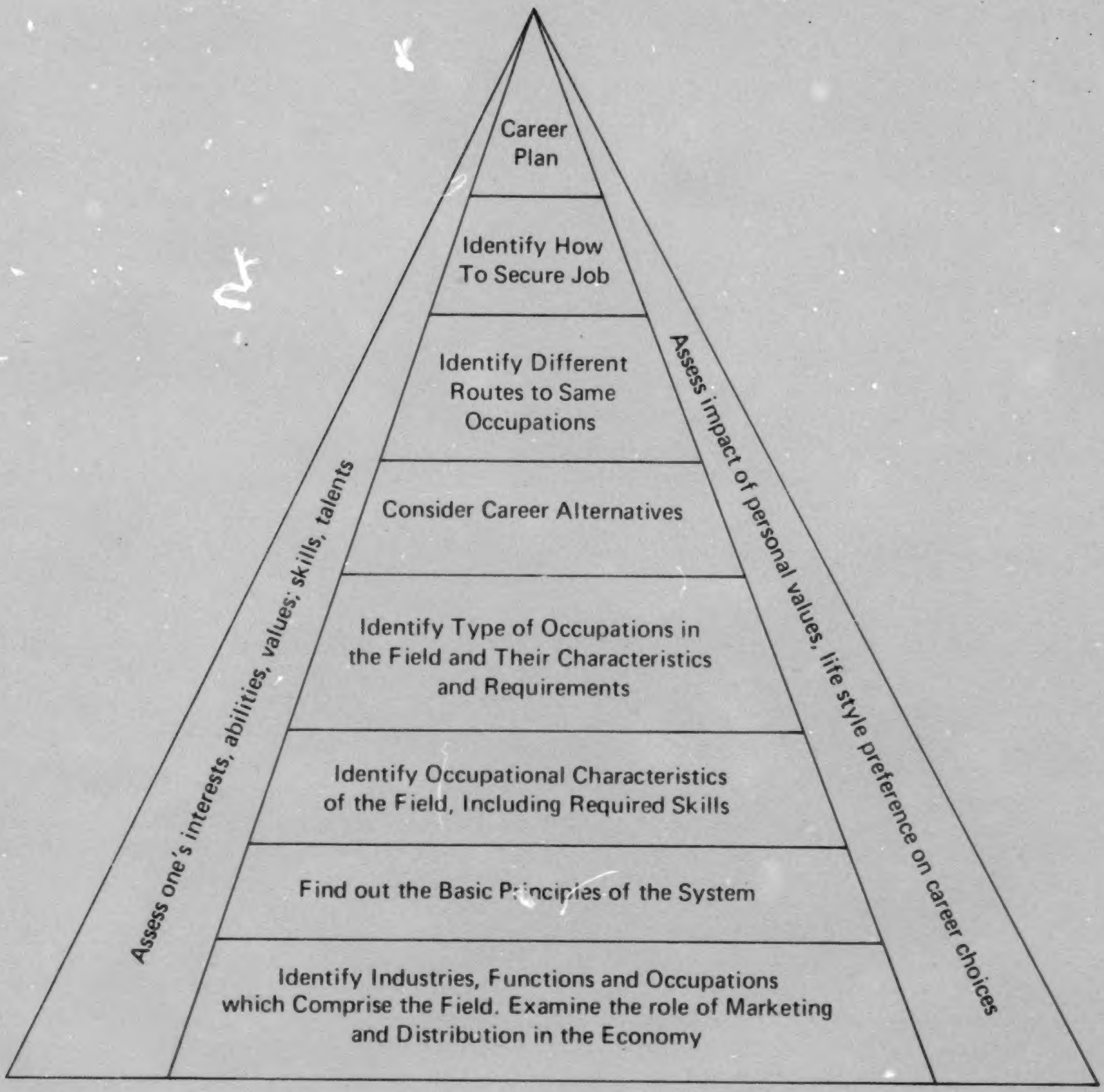
E. Content of the Curriculum: Conceptual Foundation

The conceptual basis of the curriculum is summarized in the diagrams which follow. The first one, Scheme A, indicates issues which an individual must consider in developing a career plan. The second, Scheme B, identifies the units in this curriculum which address each of the considerations. Note that the issues identified in the diagram are not necessarily presented in the same order as the curriculum units which address them. This is because the scheme simply abstracts major considerations in career planning which may be taught in flexible sequence depending upon the experience and needs of the students in any given class.

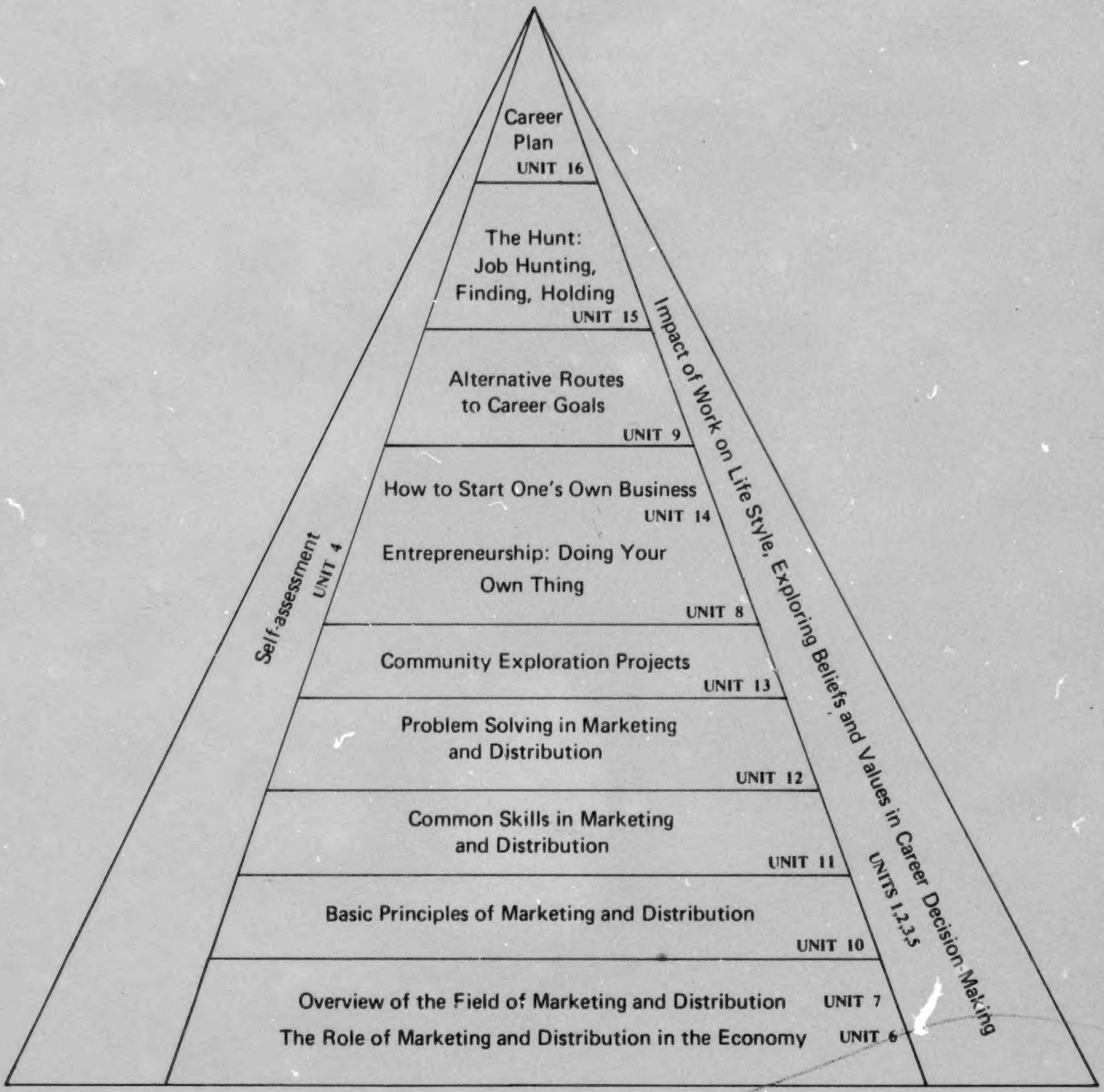
Following the diagrams is a summary of the major concepts of each section of the diagram, Scheme A, and the way in which these concepts relate to the career planning process. In capsule form, the diagrams and the summary represent the basic content of the curriculum.

A complete summary of each unit and its activities appears in the **Content Overview**, Section G. The **Content Overview** permits quick identification of all the activities in the curriculum to assist you in identifying the units you wish to use.

CAREER PLANNING – SCHEME A


Career Plan
Identify How To Secure Job
Identify Different Routes to Same Occupations
Consider Career Alternatives
Identify Type of Occupations in the Field and Their Characteristics and Requirements
Identify Occupational Characteristics of the Field, Including Required Skills
Find out the Basic Principles of the System
Identify Industries, Functions and Occupations which Comprise the Field. Examine the role of Marketing and Distribution in the Economy
Assess one's interests, abilities, values; skills, talents
Assess impact of personal values, life style preference on career choices

CAREER PLANNING – SCHEME B


Career Plan
UNIT 16
The Hunt: Job Hunting, Finding, Holding
UNIT 15
Alternative Routes to Career Goals
UNIT 9
How to Start One's Own Business
UNIT 14
Entrepreneurship: Doing Your Own Thing
UNIT 8
Community Exploration Projects
UNIT 13
Problem Solving in Marketing and Distribution
UNIT 12
Common Skills in Marketing and Distribution
UNIT 11
Basic Principles of Marketing and Distribution
UNIT 10
Overview of the Field of Marketing and Distribution
UNIT 7
The Role of Marketing and Distribution in the Economy
UNIT 6
Self-assessment
UNIT 4
Impact of Work on Life Style, Exploring Beliefs and Values in Career Decision-Making
UNITS 1,2,3,5

SUMMARY OF CONCEPTS AND THE RELATIONSHIP OF EACH CONCEPT TO CAREER PLANNING

CONCEPTS	RELATIONSHIP TO CAREER PLANNING
Assess Impact of Personal Values and Life Style Preferences in Career Choices The assessment of career choices in terms of personal needs includes: • contribution of work to personal satisfaction • influence of off-the-job demands on occupational choices • exploration of values in terms of rights and responsibilities of employees, employers and consumers.	Also an essential element in career planning and one that is ongoing is the process of assessing career choices in terms of one's values, life style preferences and needs for personal satisfaction. Only in this way can the total "self" be served and career planning made meaningful.
Assess One's Interests, Abilities, Skills, Talents Each student identifies his interests, abilities and values. This includes: • dreaming about the future as well as being realistic about it • determining preferences for working with people, ideas or things • determining preferences for ways of interacting with people, ideas and things • identifying product preferences.	An essential element of career planning is the ongoing process of assessing one's personal preferences, and identifying one's capabilities. This process is carried out throughout career planning. A career plan cannot be realistic or meaningful unless this process occurs. By conducting this analysis, one can • determine his/her preferences for a working environment (an issue often underestimated in career planning). • begin to identify appropriate job matches for his/her personal satisfaction.
Examine the Role of Marketing and Distribution in the Economy The role of marketing and distribution is studied from the point of view of: • exchange • channels of distribution • the flow of goods from producer to consumer.	An understanding of the total environment necessitates a study of the role of marketing and distribution activities in the economy.

CONCEPTS	RELATIONSHIP TO CAREER PLANNING
Identify Industries, Functions and Occupations which Comprise the Field The field is viewed from several perspectives: • marketing functions • industries in marketing and distribution • businesses within the industries • occupations by function and industry • the consumer.	To reach the ultimate goal of making a career decision, and preparing a career plan, a funneling process must occur. To get an overview of the total system in which one will operate one must "get a feel for" the environment in which he/she might work. An understanding of the total environment includes a comprehensive view of the industries and business involved in the system.
Find Out the Basic Principles of the System Basic substantive concepts of marketing and distribution: • exchange • a market • marketing functions • marketing system • competition • profit • channels of distribution • forms of ownership	Before one can effectively pursue a career, he/she should understand the fundamentals of the system in which that career would operate. In this way only can the person intelligently: a) determine if it is a field he/she would be interested in pursuing as a career; and b) identify and comprehend how his/her career might fit into and interact with the total system.
Identify Occupational Characteristics of the Field, Including Required Skills Basic characteristics associated with the marketing and distribution system: • service • recordkeeping • money management • interpersonal relations and communications skills	An understanding of the total system in which a career might operate includes not only a knowledge of the substantive concepts, but also an understanding of operational issues associated with the system. A person seldom works in a vacuum, especially in the field of marketing and distribution. Therefore, an appreciation that selection of a career choice should include consideration of how the total system **interacts** is imperative.

CONCEPTS	RELATIONSHIP TO CAREER PLANNING
Identify the Type of Occupations in the Field and Their Characteristics and Activities Each student studies in depth occupations of interest. The study includes identifying: • job tasks and responsibilities • education and training required for job • promotional opportunities.	To further refine the process, one must ascertain the specific environment of the career. That is, there are characteristics specific to occupations as well as characteristics associated with the total system and the businesses within that system. To accomplish this, the individual must learn as much about the occupation in advance of making a career decision as possible. This requires first-hand observation in real-world settings.
Consider Career Alternatives The essentials for operating one's own business include: • assessing the characteristics of entrepreneurship • the elements for effective business planning • the suitability of entrepreneurship for oneself.	As part of assessing one's interest in working in marketing one must look at alternative routes. One such route, especially applicable to marketing and distribution, is entrepreneurship, pervasive and attractive to many people. Its advantages and disadvantages must be assessed.
Identify Different Routes to the Same Occupations Alternative routes to career goals include: • concept of career path • relationship between education and jobs • relationship among jobs.	There is more than a single way to reach a goal. Education, training and experience are different components. Career decision-making must include considerations of alternative routes.
Identify How to Secure a Job The essentials of identifying, securing and holding a job: • locating potential job openings • arranging for the interview • preparing for the interview • holding the job.	A process which occurs at various points in career planning is the process of actually securing a job. This involves implementing one's plan to realize career goals.
Career Plan	

F. Implementation of the Curriculum: Selecting Curriculum Units

Each unit of the curriculum embodies its two major emphases: 1) the principles and process of career decision-making; and 2) the application of these principles and processes to marketing and distribution for career planning purposes.

This curriculum was designed and field-tested for these two different emphases with two different audiences. The first phase, which Units 1 through 9 now represent, was designed as an overview sequence in career decision-making as applied to marketing and distribution occupations for younger or less experienced junior high school students. The second phase, now identified as Units 4 and 10 through 16, was used as an in-depth course in career planning in the marketing and distribution field for older students who had previous experience in the basic concepts and skills of career decision-making.

Overview Sequence

The overview exploratory curriculum (Units 1 through 9), developed as an introduction to careers in marketing and distribution and to the career planning process, aims to achieve a single **outcome**: acceptance or rejection of continued exploration of marketing and distribution careers. Even this decision is not irrevocable for students at this juncture. In career exploration, however, students are encouraged to refine their tentative choices to a manageable number and expend prime educational time on in-depth exploration of a few career fields, or clusters. Even for those who decline to pursue further study, valuable learning in career decision-making and in the central role of marketing and distribution in the economy will have been gained.

In-Depth Sequence

The in-depth curriculum (Units 4 and 10 through 16) has been developed to facilitate students' career planning in marketing and distribution. The curriculum is targeted at students who have selected marketing and distribution as a major area of occupational interest based upon their experience with the overview curriculum. These units were designed to be delivered as a single course of approximately one semester.

Curriculum units may be selected to accomplish these two different emphases or meet other objectives unique to each school setting.

1. The overview curriculum can be implemented as originally designed to be infused into existing curricula;
2. The in-depth curriculum can be implemented as a discrete course, as originally designed;
3. The entire curriculum, Units 1 through 16, can be implemented as one offering in the sequence presented;
4. Adaptations to the curricula can be made for infusion into existing curricula in an abbreviated fashion.

Although there are many possibilities for sequencing the units, these four strategies represent the basic types of alternative implementations.

Recommendations for each of these four strategies are discussed briefly in turn.

Strategy 1: Overview Curriculum Infused Into Existing Curricula

Under this plan, students can examine and experiment with career decision-making skills as part of their existing curricula. At the end of this process they will select or reject further exploration of the field of marketing and distribution. If they select to pursue further exploration, they will enter the in-depth exploration course for career planning in marketing and distribution.

The overview curriculum can be infused into various subjects but principally into:

- Social Studies in conjunction with a study of economic concepts, social organization, decision-making, entrepreneurship;
- English for interpersonal skills and career choices;
- Math in conjunction with a study of money management, recordkeeping and the concept of pricing.

The following chart identifies existing courses in junior high school level considered best for each of the first nine units.

SUGGESTED COURSES FOR INFUSION OF CAREER DECISION-MAKING UNITS

UNIT		EXISTING COURSE
Unit 1:	Career Decision-Making	Social Studies; English
Unit 2:	The Career Planning Process	Social Studies; English
Unit 3:	The Impact of Work on Life Style	Social Studies; English
Unit 4:	Self-Assessment and Occupational Analysis	Social Studies; English
Unit 5:	Beliefs and Values in Career Choices	Social Studies; English
Unit 6:	The Role of M&D in the Economy	Social Studies (Geography); Math
Unit 7:	Overview of M&D Businesses, Functions and Occupations	Social Studies
Unit 8:	Entrepreneurship: Doing Your Own Thing	Social Studies
Unit 9:	Alternate Routes to Career Goals	Social Studies; English

Strategy 2: In-Depth Curriculum as a Discrete Course

The in-depth curriculum offers pre-vocational or vocational training for marketing and distribution occupations. Therefore, if taught as a discrete course it could best be taught by a specialist such as a distributive education high school teacher, a career education specialist, or a counselor supervising independent study.

The following chart summarizes the suggested sequencing for implementation of the in-depth curriculum as a discrete course.

SEQUENCING FOR IN-DEPTH COURSE ON CAREER PLANNING IN MARKETING AND DISTRIBUTION OCCUPATIONS

Unit 10: Basic Principles of Marketing and Distribution
Unit 11: Common Skills in Marketing and Distribution
Unit 12: Problem-Solving in Marketing and Distribution
Unit 4: Self-Assessment and Occupational Analysis
Unit 13: Community Exploration Projects
Unit 14: How to Start One's Own Business
Unit 15: The Hunt: Job Hunting, Finding, Holding
Unit 16: Career Planning

Strategy 3: Entire Curriculum as A Course

Another alternative for implementation is the delivery of the entire curriculum, Units 1 through 16, as a complete course focusing on career planning in marketing and distribution. This could be done in the available sequence – i.e., beginning with Unit 1 and proceeding through Unit 16. Alternative sequences may also be appropriate for this strategy. For example, one alternative might be to combine Unit 8, **Entrepreneurship: Doing Your Own Thing**, with Unit 14, **How To Start One's Own Business**, into a larger unit. Also, if delivered as an entire course, Unit 10, **Basic Principles of Marketing and Distribution**, could precede Unit 7, **Overview of the Field**.

Strategy 4: Adaptations: Content Groups for Infusion

There are several ways in which the entire curriculum package may be adapted and/or abbreviated to meet the specific goals and experiences of the students. The units can be grouped by topic for infusion.

There are essentially three common groupings for the unit: 1) career development concepts; 2) examination of the field of marketing and distribution; and 3) basic skills of marketing and distribution. The following chart delineates the units appropriate for each grouping, and identifies existing curriculum considered best for infusion.

CONTENT GROUPING FOR INFUSION

GROUPINGS		EXISTING CURRICULA
Career Development		
Unit 1:	Career Decision-Making	Social Studies; English
Unit 2:	The Career Planning Process	Social Studies; English
Unit 3:	The Impact of Work on Life Style	Social Studies; English
Unit 4:	Self-Assessment and Occupational Analysis	Social Studies; English
Unit 5:	Exploring Beliefs and Values in Career Decision-Making	Social Studies; English
Unit 14:	How to Start One's Own Business	Distributive Education; General Business; Math; Social Studies
Unit 15:	The Hunt: Job Hunting, Finding, Holding	English
Unit 16:	Career Planning	Social Studies
Examination of the Field of Marketing and Distribution		
Unit 6:	The Role of Marketing and Distribution in the the Economy	Social Studies (Geography); Math
Unit 7:	Overview of the Field of Marketing and and Distribution	Social Studies; Business Education
Unit 10:	Basic Principles of Marketing and Distribution	Business Education; Social Studies
Unit 12:	Problem-Solving in Marketing and Distribution	Distributive Education; General Business; Social Studies
Unit 13:	Community Exploration Projects	Homeroom; Social Studies
Unit 14:	How to Start One's Own Business	Distributive Education; Math; Social Studies
Basic Skills of Marketing and Distribution		
Unit 7:	Overview of the Field of Marketing and Distribution	Social Studies; Distributive Education
Unit 9:	Alternate Routes to Career Goals	English; Social Studies
Unit 11:	Common Skills of Marketing and Distribution	English; Math
Unit 12:	Problem-Solving in Marketing and Distribution	Distributive Education; Social Studies
Unit 13:	Community Exploration Projects	Homeroom; Social Studies
Unit 14:	How to Start One's Own Business	Distributive Education; General Business; Math; Social Studies

G. CONTENT OVERVIEW

Name of Unit and Activity	Description of Activity	Method	Objectives of Unit
UNIT 1: CAREER DECISION-MAKING			
A. **What is a Career?**	With a list of six questions which address the components of career planning, students study and discuss biographical sketches to determine whether the persons described had a career or job based upon planning, education or training, stability of jobs, continuity between jobs, and upward mobility.	Individual Exercise: Profiles	This unit focuses on the role of planning and of chance in the evolution of an individual's career. Students will be able to articulate their own definition of career and evaluate the extent to which adults they interview have planned or "fallen into" their careers.
B. **Planning and Chance in Career Decision-Making**	Each student interviews two adults, of whom is employed in a marketing and distribution occupation, to determine the extent of planning and chance in their careers.	Interviews	
UNIT 2: THE CAREER PLANNING PROCESS			
A. **Mix and Match**	Students match descriptions of hypothetical individuals with job requirements. Focus is on picking jobs to suit individuals. Jobs are entry-level marketing and distribution occupations.	Individual Matching Exercise	Students examine the components of career planning, namely individual interests, skills and preferences on the one hand and job requirements and characteristics on the other.
B. **We are Pleased to Inform You . . .**	Students pick one applicant out of two for each job in marketing and distribution. Focus is on picking the best qualified applicant for the job, as an employer would.	Individual Matching Exercise	

Name of Unit and Activity	Description of Activity	Method	Objectives of Unit
UNIT 3: THE IMPACT OF WORK ON LIFE STYLE.			
A. **Career Choices for Personal Satisfaction**	Focus is on the influence of work on life style and of life style preferences on occupational choice. a. For each of two fictitious persons, students select a job which best satisfies the life style preferences of each. b. Partners role-play a fictitious job seeker and a counselor. Together they choose the job which best satisfies the individual's life style.	Individual Exercise: Role-Plays	Students explore the crucial contribution of work to the personal satisfaction of the individual. Emphasis is placed on examining job characteristics which impact dramatically on life style to broaden students' views of important factors to consider in making job choices (e.g. it is not sufficient to examine salary alone). The specific responsibilities of women with families who work outside the home are also examined.
B. **The Working Mother**	Examination of the influence of off-the-job responsibilities on career decision-making. Focus is on the population which exemplifies this issue: women with children. Students interview their mothers and local employers to examine the adjustments made by each when homemaking and child care responsibilities are combined with employment.	Interviews	
UNIT 4: SELF-ASSESSMENT AND OCCUPATIONAL ANALYSIS			
A. **The Future**	Students depict their ambitions for their future in collages and posters.	Individual Activity: Collage	Students examine their own interests, skills, abilities and values in order a) to increase their self-awareness and self-confidence b) to learn the technique of self-assessment for ongoing career decision-making and c) to direct career inquiries. Students also learn to conduct simple job analyses in order to relate their capabilities and interests to career possibilities.
B. **What Else Turns You On?**	Students choose appealing jobs from ads and consider what makes them attractive.	Individual Activity: Cut and Paste	
C. **Who Are You?**	Students assess their interests by examining how they actually spend their time. They measure their skills by noting how qualified they are already for a variety of jobs.	Individual Exercise	
D. **Organizing For A Project**	To organize a project, students purposefully apply what they know about their own and their classmates' skills and interests.	Group Planning Exercise	

Name of Unit and Activity	Description of Activity	Method	Objectives of Unit
UNIT 5: EXPLORING BELIEFS AND VALUES IN CAREER DECISION-MAKING			
A. **In the Interest of . . .**	Students role-play opposing positions of consumers and businesspersons around selected issues. In so doing, they explore their own beliefs and values in terms of the respective rights and responsibilities of businesses, consumers and employees. Emphasis on the arguments in support of each side in each situation.	Role-Play	Students discuss beliefs, values and ethical issues in career choices in marketing and distribution such as the responsibility of a buyer in purchasing merchandise which may be hazardous to users. This unit allows the students to experiment with their feelings and beliefs on specific ethical issues.
B. **What Would You Do?**	Students examine dilemmas from the point of view of the individual decision-maker in marketing and distribution occupations. Emphasis on the choices facing the individual decision-maker.	Individual Exercise: Problem Situations	
UNIT 6: THE ROLE OF MARKETING AND DISTRIBUTION IN THE ECONOMY			
A. **Overview of the Marketing and Distribution Process**	Students learn basic ideas and concepts by exchanging goods in class.	Individual study; mini-game	Students learn the role of marketing and distribution in the economy as those activities which direct the flow of goods between production and consumption. They also learn to identify specific marketing functions and the occupations associated with them.
B. **Channels of Distribution**	Students study channels of distribution in an Information Sheet and by putting in sequence business functions from production to consumption.	Individual study; small group exercise	
C. **I'll Buy It**	Students actually move a product from producer to consumer in a walk-through exercise in class in which teams perform marketing and distribution functions.	Team Exercise	
D. **Simulation**	Students create their own economic system to learn possible routes for moving a raw material in the hands of a producer to a finished product in the hands of a consumer.	Simulation	

Name of Unit and Activity		Description of Activity	Method	Objectives of Unit
UNIT 7: OVERVIEW OF THE FIELD OF MARKETING AND DISTRIBUTION				
A.	**What is Marketing and Distribution About?**	Students learn the industries and functions which comprise the field of marketing and distribution.	Information Sheet; Cluster Diagram	Students get an overview of marketing and distribution; including the study of industries and functions which comprise the field; characteristics of its occupations; the concept of the consumer and his/her importance in the field.
B.	**A Look at Marketing and Distribution Occupations**	Students identify characteristics of occupations in the field of marketing and distribution.	Individual Matching Exercise	
C.	**Who is the Consumer?**	Students identify the consumer that a variety of marketing and distribution businesses serves.	Individual Matching Exercise	
D.	**If You're in a Hurry**	Students identify features of businesses which meet different consumer's needs and preferences.	Individual Matching Exercise	
E.	**We've Got One Right Here in Town**	Students prepare a guide for new residents to the marketing and distribution businesses in the local community, based on a "walking tour" and/or use of directories.	Community Exploration	

Name of Unit and Activity	Description of Activity	Method	Objectives of Unit
UNIT 8: ENTREPRENEURSHIP: DOING YOUR OWN THING			
A. **What Entrepreneurship is All About**	Students examine the pervasiveness of entrepreneurship in the American economy and why entrepreneurs succeed or fail.	Individual Study: Information Sheet	Students explore entrepreneurship in marketing and distribution as basis for assessing its appeal to them.
B. **What Kind of People are Entrepreneurs?**	Students examine personal traits of entrepreneurs and experiment with occupational characteristics of independent business ownership.	Individual Study: Information Sheet	
C. **I'd Rather Do It Myself**	Students interview entrepreneurs to examine further the advantages and disadvantages of selecting this career option.	Interview	
UNIT 9: ALTERNATE ROUTES TO CAREER GOALS			
A. **Let's See How Charlie Moves**	Students examine an individual's work history to illustrate the importance of making the most of previous work experiences in seizing future opportunities.	Individual Exercise; Chart, Case Study	Students learn alternate routes to the same occupations; the concept of a career path; the relationship between education and jobs; and the relationship among jobs. Students also learn the importance of education and training, techniques for identifying the education and training prerequisites for specific occupations, types of secondary and postsecondary institutions and programs in the field, and specific opportunities for education and training in their local community.
B. **Moving On Up**	Students examine how skills are related among jobs.	Individual Exercise	
C. **Stepping Along**	Students develop a career path to illustrate that career paths represent a dynamic history as well as an enabler for the future.	Individual Exercise	
D. **Schooling for Moving**	Students examine the many educational options available to persons interested in pursuing careers in marketing and distribution.	Individual Study: Information Sheet, Chart	

Name of Unit and Activity	Description of Activity	Method	Objectives of Unit
UNIT 10: BASIC PRINCIPLES OF MARKETING AND DISTRIBUTION			
A. **Marketing**	Students illustrate how marketing processes work via a pantomime with objects.	Team Exercise: pantomime	Students examine basic principles and concepts which underlie the economy and marketing and distribution activities.
B. **Exchange**	Students explain how fundamental the concept of exchange is by explaining it to an imaginary group of kindergarten students.	Individual study: presentations	
C. **Supply and Demand**	Students identify how the concept of supply and demand is fundamental to our eccnomy through experimenting with an example in a mini-game.	Individual study: mini-game	
D. **Market**	Students illustrate the importance of market segmentation and identification of marketplace by defining each for a product and service.	Individual study: exercise	
E. **Channels of Distribution**	With pictures from magazines, students illustrate how products move through channels of distribution.	Individual study: collage	
F. **Value-Added**	Students illustrate the concept of value-added by adding value to an object in their desks.	Individual study: game	
G. **Profit**	Students prepare a script for a group of foreign students to explain the concept of profit, and the benefits derived from it.	Individual study: presentations.	
H. **Competition**	Students develop a collage from newspaper clippings to illustrate the pervasiveness of competition among businesses in our economy.	Individual study: collage	
I. **Risk**	With examples, students explain the concept of risk to other members of the class.	Individual study: presentation	
J. **Forms of Ownership**	Students analyze how forms of ownership depend upon nature of businesses by identifying different forms used by businesses in their community.	Individual study: Community Exercise	

Name of Unit and Activity	Description of Activity	Method	Objectives of Unit
UNIT 11: COMMON SKILLS IN MARKETING AND DISTRIBUTION			
A. **Interpersonal Skills**	I. **Consumer Service.** Students learn the importance of consumer service by analyzing case studies.	Case Studies	Students learn the central characteristics of marketing and distribution operations: for example, the concept that consumer service and human relations skills are essential for effective job performance. Recordkeeping and money management skills are also basic and applicable across the field.
	II. **Employee-Employee Relationships.** Students role-play situations requiring interpersonal skills in dealing with fellow employees.	Role-play	
	III. **Employer-Employee Negotiations.** Students practice interpersonal skills by role-playing a conflict situation.	Role-Play	
B. **Communications Skills**	I. **Verbal Communication.** Students practice communications skills by giving presentations.	Presentations	
	II. **Non-Verbal Communication.** Students demonstrate communications skills by pantomiming products and occupations in a game.	Pantomime	
C. **Interpersonal and Communications Skills in Review**	Students assess interpersonal and communications skills of marketing and distribution employees through observation.	Community exploration	
D. **Recordkeeping and Money Management**	I. **Gina's Itinerary.** Students examine and experiment with the need for recordkeeping in marketing and distribution occupations.	Small group planning exercise	
	II. **Gina Sells.** Students develop further understanding of recordkeeping and experiment with money management in marketing and distribution occupations.	Small group calculations exercise	

Name of Unit and Activity		Description of Activity	Method	Objectives of Unit
UNIT 12: PROBLEM SOLVING IN MARKETING AND DISTRIBUTION				
A.	**The Big Picture**	Students prepare a promotional campaign for a new movie.	Case Study	Students are confronted with typical decisions in marketing and distribution occupations and practice problem solving in the five marketing functions in different industries.
B.	**Store for Rent**	Students role-play a real estate agent who assists a florist in the location of an appropriate store.	Role-Play	
C.	**Is It Worth It?**	Students consider the pressures on the district manager of a supermarket chain facing a decision to change check-out equipment.	Small group exercise	
D.	**Change the Station**	Students develop their buying skills as "time-buyers" in an advertising agency.	Case Study	
E.	**What Do Our Customers Want?**	Students develop basic research skills as they design a market research questionnaire for an airline considering a new service.	Small group exercise	
F.	**Which Way Do We Pay?**	Students make a management decision concerning employees' salary conditions.	Case Study	
G.	**Eyewitness News**	Students interview and observe marketing and distribution employees to determine their responsibilities and tasks.	Interview	

Name of Unit and Activity	Description of Activity	Method	Objectives of Unit
UNIT 13: COMMUNITY EXPLORATION PROJECTS			
A. **It's That Time of Year**	Students plan and put up window displays.	Individual or group activity	Students explore community in order to learn various skills in marketing and distribution occupations including: preparing displays, comparative pricing strategies and researching a market. This unit suggests major field projects, including DECA, although community experiences are suggested throughout the curriculum. First-hand experience in the world of work is encouraged.
B. **Comparison Shopping**	Students compare pricing strategies of three marketing and distribution industries.	Community exploration	
C. **Conducting a Survey**	Students get experience in marketing research, interview techniques, designing interview forms, and analyzing data.	Interview	
D. **Starting a Business**	Students develop a plan for starting a school-based business.	Group or class activity	
E. **Distributive Education Clubs of America**	Students review Distributive Education Clubs of America activities.	Individual Study: Information Sheet	

Name of Unit and Activity	Description of Activity	Method	Objectives of Unit
UNIT 14: HOW TO START ONE'S OWN BUSINESS			
A. **Review of Entrepreneurship**	Students re-examine some of the advantages and disadvantages of entrepreneurship in class discussion.	Class Discussion	Students learn the essentials of planning, starting and operating a business. Emphasis is placed on the often-overlooked aspect of planning. Entrepreneurship is widespread in the field of marketing and distribution and student-operated businesses are encouraged.
B. **Identifying the Market**	I. **Cora's Dress Shop**. Students identify generic characteristics of a market in a case study.	Case Study	
	II. **See the Light**. Students analyze degree to which an entrepreneur appropriately investigated the market in a case study.	Case Study	
C. **Financing a Business**	Students identify typical expenses and capital requirements for financing a business, and funding sources for doing so.	Individual study: Information Sheet and Interview	
D. **Making Financial Projections**	Students make financial projections.	Individual Exercise: Case Studies; Calculation	
E. **Organizing a Business**	I. **Organization Chart**. Students match staff with functions.	Individual Matching Exercise	
	II. **Organizing for Work**. Students identify tasks and functions and develop a plan in case study exercise.	Case Study	
F. **Promoting a Business**	Students develop their own advertising campaign, deciding on media, audience, etc.	Small Group Creative Exercise	
G. **Business Planning In Review: Will Joe Make It?**	Students analyze a fictitious new business to assess the quality of planning behind it and predict its likelihood of success.	Case Study; Community/ Business Analysis	

Name of Unit and Activity	Description of Activity	Method	Objectives of Unit
UNIT 15: THE HUNT: JOB HUNTING, FINDING, HOLDING			
A. **Locating Job Openings**	Students identify job openings and the sources of this information for their three favorite occupations as an out-of-class activity.	Community Exploration	Students learn the steps involved in seeking, securing and holding a job. Students will actually perform or simulate many of the steps in this process.
B. **Arranging for the Job Interview**	Students role-play arranging for job interview.	Role-Play	
C. **Preparing for the Interview**	I. **Employer Needs to Know.** By interviewing employers, students identify what the employer needs to know about the job seeker.	Interview	
	II. **Writing Yourself Up.** Students learn to sell themselves by preparing a resume and completing a job application.	Small Group Exercise	
	III. **Applicant Needs to Know.** In small group discussion, students learn what the applicant needs to know about the employer.	Small Group Discussion	
D. **The Interview**	I. **Employer and Interviewee Responsibilities.** Students identify the issues concerning the interview responsibilities of the employer and applicant by analyzing a sample dialogue and profiles.	Small Group Exercise	
	II. **The Interview.** Students practice their interviewing skills in role plays.	Role-Play	
E. **Follow-Up on Employment Contact**	Students discuss importance of follow-up.	Small Group Exercise	
F. **Holding a Job**	Students analyze mini-cases to determine reasons why people become dissatisfied with jobs.	Case Studies	

Name of Unit and Activity	Description of Activity	Method	Objectives of Unit
UNIT 16: CAREER PLANNING	Students develop an individualized career plan.	Individual Planning Exercise	The unit on Career Planning integrates much of the knowledge, skills and abilities that have been exercised and developed in earlier units. The purpose of this integration is for students to develop a realistic and usuable **career plan** which they will subsequently modify and follow as they progress towards achieving their career objective.

H. Teacher Qualifications

A teacher should be competent in three major areas, i.e., career decision-making and career education, management of in-class and field activities, and marketing and distribution in order to teach this curriculum effectively. Capabilities in these areas may be acquired with relative ease.

The following statement of essential knowledge and attitudes required for teaching the units is included in order to provide direction to teachers as they prepare to use the curriculum.

Career Decision-Making and Career Education

1. Schools are playing an increasingly large role in preparing students for adult roles.
2. The U.S. Office of Education's career education scheme moves from career awareness through exploration through skill development.
3. A person is always in a process of *becoming* based upon his previous experiences. A person's career is his total experience.
4. Career decision-making is an ongoing, lifetime process, not occasional job-selection events.
5. The career decision-making process is explained by different hypotheses. The most commonly held focuses on the matching of individual interests, values, aptitudes and skills with occupations which fulfill or express them. This is known as the "trait-and-factor" theory. Not totally satisfactory, it nevertheless is more usable as a tool than psychological, sociological and other explanations of career decision-making.
6. Students' horizons on what careers they might pursue need to be broadened beyond their limited knowledge, expectations of their parents, peers and themselves, and adolescent capabilities. This is an antidote to limited expectations and experience.
7. Students' expectations of what careers they might pursue need, at the same time, to be tempered by the realities of their capabilities, educational opportunities, and job markets. This is an antidote to excessive fantasy.
8. Career choices by adolescents are obviously tentative. They should not be discouraged on the grounds of inexperience. Choices are constantly made by default; students who fail to explore opportunities may not take actions which will prove necessary to a career choice.
9. Students must be guided to assess their own interests, values, aptitudes in order for them to be able to make suitable career choices which will contribute to their personal fulfillment.
10. Student interests, values and goals must be respected. Limited or extensive commitment to high salaries, for example, are equally viable positions.

Management of In-Class and Field Activities

This area includes the following kinds of teacher functions and attitudes:

1. Guiding students in pursuing individual interests and management of a group of individuals engaged in somewhat different pursuits.
2. Organizing the class into small groups and monitoring or coaching the parallel but independent activities of a number of sub-groups in the class.
3. Comfort with the impossibility of knowing all the facts and being able to assist students to learn what they need to know.
4. Utilizing and reproducing non-text materials (e.g., interview forms, exercise instructions).
5. Familiarity with local community resources in business and education to guide students in field activities.
6. Development of direct or indirect liaison with these resources and establishing a procedure for making arrangements with them. Either personally, or through counselors, contacting local businesspersons to arrange interviews for students.
7. Planning time to follow-up all field activities and in-class individualized exercises. Synthesis of learning at the end of these types of exercises is essential to effective learning. Time for follow-up should be allotted even if other exercises therefore need to be omitted.

Marketing and Distribution

1. Marketing and distribution functions are virtually all those which occur between production of a product or service and its delivery to the final consumer.
2. The Marketing and Distribution Cluster, provided herein, describes industries and occupations which are representative in the field of marketing and distribution.
3. The following references are useful in finding out what certain jobs involve:

   Dictionary of Occupational Titles, U.S. Department of Labor

   Encyclopedia of Careers and Vocational Guidance, Doubleday and Co., Inc.
4. The following concepts are of major importance in this unit:

   exchange, service, market, marketing system, profit, competition, business organizations, entrepreneurship, value-added, wholesale, retail, consumer, producer, middleman.

   (See the Glossary for definitions of these concepts.)
5. Virtually every business employs individuals ening and distribution occupations requires analytic thirteen million workers are engaged in marketing and distribution; many entry-level, part-time and summer jobs are available in the field. Thus, many students are likely to be employed in a marketing and distribution job, including those who seek self-employment.
6. Defining the tasks and responsibilities of marketing and distribution occupations requires analytic skills rather than extensive knowledge of numerous occupations.
7. Understanding the characteristics of small self-owned businesses and the rewards and responsibilities of entrepreneurship is important. Assisting students to develop a business plan requires an understanding of analyzing markets, developing organizational plans, identifying sources of capital and soliciting information on availability of capital under different conditions of personal finances and business plans.
8. The basic interpersonal skills associated with concepts of service, consumer, personnel relations, and so forth, are fundamental to marketing and distribution occupations.
9. Understanding the basic steps in finding, obtaining and holding a job will assist students in applying them.

I. Evaluation

In order to determine whether students have learned the skills which this curriculum sets out to teach, performance criteria are suggested which may be measured orally, in written form, or through observation of student participation in the activities.

Since career exploration is solely for the student's benefit, the school should not be particularly concerned with the questions: has the student learned the facts? has he explored well? The real indicators of effective learning are that the student has made *decisions intelligently*. The problem of evaluation then focuses on both aspects of this measure. Has the student made a decision? This is readily observable. Has the student made decisions intelligently? It is this latter question which the evaluation tools are designed to answer.

The components of a choice intelligently made are those of career planning itself. The student must learn about himself and about occupations in the field under study in order to be able to make an intelligent choice about further exploration. For the individual, there are no right or wrong answers. The teacher's measure of that component is simply that the student has in fact performed a self-assessment and has produced any written products required in the process. To determine whether students have learned about marketing and distribution occupations, two alternative types of measures may be used: a) an essay approach asking students to articulate the reasons for their final decision to pursue or reject further exploration in the field, b) an oral or written problem-solving exercise in which students examine jobs not previously studied in the curriculum, to assess them first in terms of their characteristics, next in terms of their own interests, and finally to review their decision against these new occupational opportunities.

The major type of evaluation which is encouraged throughout the curriculum monitors student progress unit by unit. This serves two purposes. First, it provides feedback to the teacher on pacing the program. Second, it serves as an input to final evaluation of the curriculum and may, in fact, make any exercise resembling a final examination totally unnecessary. This type of evaluation is presented throughout the curriculum in the form of Performance Criteria.

INTRODUCING THE CURRICULUM TO STUDENTS

Effective learning requires that students know why they are embarking on a course of study, what they should expect to learn, what is expected of them and what, in fact, they are going to do. For these reasons, it is of prime importance that the curriculum be introduced to students.

To give students an overview of career exploration in marketing and distribution, the points below are suggested. The specific emphasis, objectives, units and activities selected for presentation, must, of course, be determined first and will mold the specific introduction delivered to students.

1. This curriculum is an introduction to career development and to marketing and distribution occupations.
2. It provides students with the opportunity to learn career decision-making as it applies to any career field, to develop and practice skills that are important in the world of work, to learn about marketing and distribution occupations, and to develop individual career plans.
3. By the end of this study, you will be able to make knowledgeable decisions about your future careers and will know enough about the marketing and distribution field to accept or reject it as a career choice – at least for the present time.
4. What is career development? It is a term that describes several different processes including finding out what you, as an individual, are all about, (called self-assessment), and finding out what the world of work is all about. Career development requires an assessment of individual interests, abilities, skills, values, talents and opportunities. It also requires analysis of the characteristics, requirements and opportunities associated with various occupations. Career decision-making applies to any field. In this curriculum, it will be applied to marketing and distribution.
5. What is marketing and distribution? This is a term which describes a broad field of occupations. These occupations accomplish functions which direct the flow of goods and services between producers and consumers. The marketing and distribution field is an important one because:
    1. One out of five people will at one time or another work in it.
    2. Marketing and distribution is a field in which employment opportunities (job openings) are growing at a rapid rate.
    3. Many entry-level, part-time and summer jobs are in marketing and distribution.
    4. All individuals, because they are consumers, deal with marketing and distribution whenever they purchase goods or services.
6. What is a career plan? It is a statement of career goals, that is, a description of what an individual hopes to achieve, and it describes different ways of achieving these goals, through education, training, and/or experience.
7. Since the curriculum is devoted to an exploration of these concepts in depth, you will achieve a better understanding of these and others as you proceed through the units.
8. People learn in many different ways, by reading, listening to presentations, discussing ideas, doing exercises, playing games, practicing skills, observing and talking with others. In this curriculum you will be learning new skills and ideas in all of these ways. No one is expected to know all the facts or to be expert in all the skills. This is an opportunity to learn how to find out and to "try on" different possible futures. In many cases, there will be no absolutely right or wrong answers.
9. Both classroom and community are valuable places in which to learn. The classroom provides a safe setting in which to practice skills. The community provides the opportunity to see things and talk to people who are actually part of the working world. Both should be used to develop career decision-making skills.
10. No one is expected to end this sequence with career decisions and career plans cast in concrete. Career plans change as the individual does and as opportunities change. Nevertheless, the ability to make knowledgeable career decisions is an invaluable tool for the present and throughout one's lifetime.
11. Describe how the curriculum is to be taught, i.e. what specific units will be used, how long they will take, for what specific systems. The content of this part of the introduction depends on the specific curriculum sequence selected.

GLOSSARY

Apparel: Clothing.

Assets: All of a person's or business' properties and claims against others. Assets include the value of tangible things, such as cash and inventory, and that of intangibles, such as a trade mark or good will.

Bonus: Extra sum of money above regular compensation usually given to an employee or salesperson to reward performance.

Buyer: Individual who purchases merchandise for resale or for use in manufacturing.

Career: Experiences; progression of occupations; work history; total life.

Career Path: Series of occupations or educational experiences which contribute to the achievement of a career goal; work history.

Case Study: Fictional example of a problem used to teach decision-making and analysis skill.

Cashier: Person responsible for cash transactions such as collecting money.

CGS-Cost of Goods Sold: The cost which a business pays for merchandise for resale.

Channels of Distribution: Series of business establishments which play a role in moving goods from the manufacturer to the consumer.

Client: Customer (individual or business).

Cluster: Grouping of related occupations. For example, the Marketing and Distribution Cluster.

Commission: Percentage of sale paid to a salesperson as compensation, usually figured as a percent of gross sales.

Competition: Actions of businesses to attract the business of the consumer to their own establishment rather than to others providing similar products and services.

Consumer: Individual or business which buys and uses goods and services.

Consumer-oriented: Used to describe business establishments and employees which seek to please/satisfy the needs of the consumer.

Corporation: A form of business ownership where owner liability is limited to the amount of investment. A corporation is a legal "person" under state laws.

Credit: Deferred payment for goods and services purchased.

Dealership: Business that is given the right to sell the products of a certain company, such as an automobile dealership.

Disbursement: Amount of money paid out by a business.

Discount: Reduction in price, usually as a benefit to employees or in exchange for early payment of bills.

Distribution: Movement of goods and services from producers to consumers.

Distributive Education: Program of instruction at high school, postsecondary and adult levels that is designed to prepare students for initial entry and advancement in careers in marketing and distribution.

Enterprise: Business venture.

Entrepreneur: A person who organizes, manages and assumes the risk of a business venture.

Exchange: Process of trading goods and services in kind or for money.

Expenses: Money paid for operating a business (for example, electricity, office supplies).

Franchise: The license sold to an organization or individual to operate a business using a certain name, selling certain products.

Fringe Benefits: Compensation in addition to salary which is given to an employee in non-monetary form. For example, vacation time and sick-leave.

Goods: Merchandise.

Gross Profit: Amount of money earned after subtracting cost of goods sold from sales.

Gross Receipts: Amount of money taken in by a business.

Incentive: A reward to encourage action or performance, e.g. a raise in salary.

Interpersonal: Between or among people; usually refers to skills in dealing with other people.

Inventory: Amount and type of merchandise in stock.

Itinerary: Schedule and routing of a trip.

Job Description: Tasks performed and skills required for an occupation; what the worker actually does.

Lateral Mobility: Movement from one occupation to a similar occupation in the same or different industry without increase in responsibility.

Life Style: Aspects of a person's life which reflect personal choices, preferences and characteristics.

Management Responsibility: Organizing people, money and things to accomplish a purpose or achieve a goal.

Manufacturer: Business establishment that generally converts raw or unfinished materials into a finished product or a product for further processing.

Market: 1. Location of business establishments where goods are sold.

2. Group of potential customers, identified by similar characteristics related to needs and wants as consumers, such as the teen-age market.

Marketing: Business activities that direct the flow of goods and services from the producer to the consumer.

Marketing and Distribution: All of those business activities that direct the flow of goods and services from the producer to the consumer.

Marketing Function: Major business activities in marketing and distribution, e.g. selling, sales promotion, market research.

Market Research: Gathering, recording and analyzing information about consumer preferences in order to determine best ways of marketing.

Market Segmentation: Subdividing potential customers according to their characteristics in order to develop alternative marketing strategies. For example, a group of potential customers might be segmented by age or sex.

Negotiate: Discuss with other individuals in order to come to fair terms of a deal.

Net Profit: Amount of money remaining after cost of goods sold and expenses have been paid.

Partnership: Form of business ownership that involves two or more people in business together.

Personnel: Employees of a firm.

Policy: A guiding procedure or general rule which management uses to make its plans and decisions. For example, some companies have a **policy** of promoting within, i.e., they will promote their own employees rather than hiring someone new.

Product: Goods.

Production: Process of converting raw or unfinished materials into a finished product.

Proprietorship: A form of business ownership that involves one person in business for himself.

Questionnaire: A list of related questions used to research needed information.

Resume: A summary of an individual's experience and education usually used in describing job applicant to potential employer.

Retailer: Business establishment that markets directly to the general public.

Risk: The degree of uncertainty involved in a decision or situation.

Role-play: To act out the position or occupation of another, usually fictitious individual.

Sales: Activities which involve assisting the consumer in deciding to make a purchase.

Sales Agreement: Document signed by buyer and seller regarding terms of sale.

Sales Promotion: Business activities that assist and support sales activities, e.g. advertising and display.

Sales Representative: Person who introduces product or service to retailers and other potential customers and makes sales agreements.

Self-Assessment: Analysis of one's own strengths and weaknesses, abilities and interests.

Service: 1. Assistance provided to the customer; attitude of help.

2. An intangible product, e.g. housecleaning, delivery, haircutting.

Skills: Everything a person knows how to do.

Supply and Demand: The economic principle which describes the relationship between the volume of goods available for sale and the volume of goods demanded by potential consumers.

Survey: Comprehensive collection of information.

Task: Component of a job, e.g., writing out receipts.

Trainee: Person who is learning responsibilities of an occupation.

Transaction: A trade or a deal.

Utility: Usefulness.

Upward Mobility: Movement from one job to another involving increased responsibility and pay; ability or desire to rise in position or status.

Value-Added: Additional worth added to a product by processing or marketing.

Wholesaler: Business establishment that purchases goods from manufacturers and sells to retailers.

UNIT 1: CAREER DECISION-MAKING

Teacher's Guide

OVERVIEW

ACTIVITIES	MATERIALS
A. *What is a Career?* With a list of six questions which address the components of career planning, students study and discuss four biographical sketches to determine whether each had a career or job based upon planning, education or training, stability on jobs, continuity between jobs, and upward mobility.	Four biographical sketches and list of six questions for each student.
B. *Planning and Chance in Career Decision-Making* Each student interviews two adults, one of whom is employed in a marketing and distribution occupation, to determine the extent of planning and chance in their careers.	Employee Interview Form for each student.

OBJECTIVES

- Students should be able to describe a longer-range view of their future employment beyond their immediate post-graduation and/or post-school termination.
- Students should be able to identify the five basic elements of career planning.
- Students should be able to explain the role of education, training and experience in career planning.
- Students should be able to conduct a simple interview.
- Students should be able to list five marketing and distribution jobs.

RATIONALE

This unit should develop in students a longer-range view of their future employment beyond their immediate post-graduation and/or post-school termination. To date, students at this age have tended, primarily because of parental and socio-economic influences, to develop a rather narrow view of what they could do and what their capabilities and potential are. An effort is made to help them broaden their view of what alternative career paths might be and lengthen their view of what their own career path might look like. The intent is neither to preach the value of long-range planning nor to argue in favor of a career commitment. The objective is rather to sensitize students to the difference between a job and a career in order to expand their horizons. Adoption of this longer range view has potential impact on the students' ability to undertake effective and personally realistic decision-making as they develop their own careers and/or job histories.

To accomplish this end, the following exercises ask students to read and discuss a series of biographical sketches in part to determine whether or not each constitutes a career, and to interview adults to further examine this concept. The determination of what constitutes a 'career,' however, is not nearly as important as the items which the students discuss in making the determination.

It should be stressed again that often the students might find that there is no clear-cut decision about whether a particular job constitutes a step in a career, but *determination of a definite yes or no answer is not as important as the discussion which takes place* as the students weigh the variables involved.

CONCEPTS

- An individual's life usually has aspects that are carefully planned, aspects that are determined primarily by chance, and aspects that combine some planning with some elements of chance.
- A person's career might center around his or her employment and education and training experiences. A career is based on planning and chance. For example, the economic environment in which you live clearly determines the kinds of jobs that are available to you. The financial status of one's family often plays a role in the education and training opportunities available. The state of the economy will determine for some people whether or not they can get a job. Family responsibilities influence minimum income requirements.
- There is a common misconception that one has to be a professional to have a career. Any person can have a career. There is no job or series of jobs which could not be considered part of someone's career.
- There is no single definition of what constitutes a career. Some definitions of "career" include a series of related (or unrelated) jobs, one or two jobs and special education and training, or no paying job at all—but rather the series of interests and activities that make up a person's life.
- Formal training and education are not the only ways to acquire marketable skills. Hobbies and other non-school activities can result in the development of marketable skills.
- Career changes occur often. Retraining is possible and often some of the skills one has acquired through work experiences and hobbies can be applied to a different job in a completely different field.
- Key elements to successful career planning are knowledge of one's own interests and characteristics and a broad-based knowledge of employment opportunities. This knowledge broadens an individual's options.
- Work typically occupies a large part of one's time. Accordingly, one should devote time and energy to considering what job will provide a meaningful and satisfying experience.

ACTIVITY A. *What is a Career?*

Introducing the Activity

1. Ask the students to identify someone they feel has a

career. Why do they refer to this person's work as a career? Does anyone they know have a job rather than a career? How do they make the distinction?

2. Highlight key terms like "career," "upward mobility," "advancement."

Guiding the Activity

3. Pass out the four biographical sketches and questions. Divide the class into small groups of 3-5 students and ask them to discuss the sketches to further define their notions of a "career."
4. Discussion questions for each profile should include:
   - Planning: What planning did each individual do concerning his/her future employment? Did he/she start with a long-range view of the future? Did the individual have goals and plan to meet those goals? Did he/she implement the plan and achieve the goals?
   - Training: Was special training or education involved? Was training obtained through a job?
   - Stability: How long did each individual stay on each job? Did the length of employment have an effect on his future employment?
   - Continuity: Was there continuity among the jobs each individual held? Did the skills and experience of one job enable the individual to obtain later jobs?
   - Mobility: Was there upward mobility between jobs?
5. Consider the Future: What is a likely next step for the individual in each sketch? Note that the last question is open-ended; this is one that the students should answer for themselves.
6. After group discussions, each group presents its conclusions to the class as a way of starting the class discussions.

Learning More From the Activity

Focus the discussion initially on analyzing each biographical sketch. Specific points noted below show the varying force of the 5 elements on individual careers.

Biographical Sketch A: Janet Jameson

Planning and Continuity: An important characteristic of Janet's work history is that, although she did not plan her total future, there is continuity among the jobs she chose. They are all related to the food industry.

Upward Mobility: Her overall work history does indicate upward mobility. Responsibilities as well as salary increased.

Stability: Janet did not stay long at her earlier jobs, although she did stay on at the last place as hostess and owner. Normally length of time on the job would contribute to subsequent references; and substantial time on a job is viewed favorably by employers. Moving around did not seem to hurt Janet, however.

Training: Nor did her lack of formal education and training keep her from becoming a business owner.

It is important to stress to students that there is no one route to success. Although formal education and training help, they are by no means the only routes to achieving success.

Biographical Sketch B: Bob Casper

Planning and Continuity: Bob Casper held five different jobs, three of which were related. Bob's job planning was confined to "I don't like this job, it's time to look for another one." There was no long-range planning for a career objective. However, Bob did discover a skill and an interest as he progressed among his jobs: he found that he liked to sell and was good at it. He kept this in mind as he sought subsequent jobs and finally found a job which met both *his income* and his interest needs.

Bob's general work history also demonstrated an overall tendency towards *upward mobility*.

Stability: Except for the car wash job, Bob spent a good deal of time on each one. This must have helped him as he sought other jobs.

Training: No formal education or training were required for Bob although he undoubtedly got a lot of both on the job.

One of the major points in this sketch is that it is possible to leave high school without a clear cut career objective in mind and to develop both an interest and a skill subsequently.

Biographical Sketch C: Tom Jetson

Planning: Tom Jetson is the most clear-cut case of career planning. Here is a young man with a long-range career objective which he was willing to pursue despite initial setbacks in funding the training he needed. Although his initial work history looks similar to

Janet's and Bob's, the important difference is that through it all he had an *underlying objective* to become a mechanic for jet engines. This is an important point that should be emphasized if it does not come up in the class discussion after the exercise.

Biographical Sketch D: Joan Flintstone

Continuity: The main point about Joan Flintstone's career is that her interests changed in a major way. Her earlier two jobs had continuity but her final job was in an entirely different field. This, however, made her no less successful since she did get a good job which she found exciting.

Stability and Upward Mobility: Joan stayed a long time at each of her jobs, did well, and advanced in the companies she worked for.

Stress that it is possible for one person to have two successful careers.

Points to Stress

- There is no single definition of what constitutes a career.
- Elements to be considered in defining a career, are:
  - planning
  - education or training
  - length of stay on jobs
  - continuity between jobs
  - upward mobility

Performance Criteria

Criteria students used to decide if biographical sketch represented a career should include at least the following:

- upward mobility (i.e., increased pay, responsibility and/or skill level).
- jobs are in similar fields (i.e., common skills required or common product).
- extent to which career follows a plan. (The "plan" may not be developed until midway through the "career.")
- length of time on each job.

If students use these criteria, they have learned the point of the study.

ACTIVITY B. *Planning and Chance in Career Decision-Making*

Introducing the Activity

1. Point out that in the previous activity students learned that there are many ways of looking at a career, and that there is more than one way to achieve a career goal.
2. In this activity, explain that they will be interviewing adults to determine the types of things which resulted in their career choice.
3. Each student should interview two adults: one can be a relative or friend; the other must be employed in a marketing and distribution occupation.

Guiding the Activity

4. Pass out the Interview Form. As a homework assignment, they should interview an adult they know well. Students may feel uncomfortable at first about interviewing someone. Go over each question on the interview form. A benefit of the first interview with a relative or friend is for students to become more relaxed with entire interviewing process. Help students by making contacts with employers for interviews. The school counselor might lend assistance.
5. Discuss the results of the first interview with the class. This discussion should include issues of interviewing as well—e.g. were there any questions the interviewee needed to have explained further, etc.
6. Pass out (or put on blackboard) some marketing and distribution occupations in your community.
7. Each student should select an occupation they are interested in for their second interview. Students can work in pairs, or small teams in conducting these interviews.
8. Ask students the types of jobs held by individuals they interviewed, their reasons for taking the jobs, whether the jobs were similar or all very different, whether the job represented a career goal or not, and so forth. In this manner, students will gain an appreciation for the different types of career paths an individual might take.
9. Make a chart on the blackboard to summarize some of the information on the interview forms.

Learning More From the Activity

Specific questions to be answered by the interview data include:

- Did interviewees plan in advance for the job they currently hold or for the field they are working in?

- Did any interviewees seem to "fall into" their job or field?
- Do those who planned their careers have high-level jobs? (Examine the jobs of interviewees in relation to the amount of planning. They will not necessarily be related, but the question should be raised.)
- Did any of those interviewed by students have similar jobs? If so, how did their work histories compare? Did they arrive at similar positions through different routes?

Points to Stress

- Chance and effective use of chance are important aspects of career planning.
- There is more than one way to achieve a career goal.

Performance Criteria

In brief written summary, students should identify at least one "chance" situation that affected interviewees' employment history. Chance situations may be external circumstances such as death in family requiring immediate employment, chance educational opportunity such as being trained in the military, etc.

Students should describe whether job after chance situation represents a step in a career according to the criteria of upward mobility, similar fields, and length of time on the job.

RESOURCES AND REFERENCES

A Job That Goes Someplace. Pleasantville, N.Y., Guidance Associates. Filmstrip-cassette kit looks at working young people and decisions related to pre-job strategy and job advancement.

Boocock, Saranne S. *Life Career*. Wayne, N.J.: Western Publishing Co., 1969. Participants in this game make plans for their future with regard to occupation and education and develop understanding about career decisions, life style, educational and occupational opportunities.

Borosom, Warren. "New Careers For Old." *MONEY*, April, 1974. (pp. 22-26) Article describes phenomenon of career switching.

Career Education Resource Guide. General Learning Corporation, 1972. Exclusive collection of successful K-12 career education classroom activities. Includes many activities relative to career planning and reasons people pursue careers.

Gelatt, H.B., Varenhorst, Barbara and Carey, Richard. *Deciding*. Princeton, N.J.: College Entrance Examination Board, 1972. Program of Study designed to teach junior high students to make decisions. Leaders guide available.

Life. Springfield, Mass. Milton Bradley Co. Game for 2-8 participants who proceed through "life" earning, investing, etc. Game indicates role of chance in an individual's career.

UNIT 2: THE CAREER PLANNING PROCESS

Teacher's Guide

OVERVIEW

ACTIVITIES	MATERIALS
A. *Mix and Match*	
Students match descriptions of hypothetical individuals with job requirements. Focus on picking jobs to suit individuals, not the other way around. Jobs are entry-level marketing and distribution occupations.	6 profiles of individuals, 6 job descriptions for each student
B. *We are Pleased To Inform You. . .*	
Pick one applicant out of two for each job in marketing and distribution. Focus on picking the best qualified applicant for the job, as an employer would.	6 job descriptions 12 applicant profiles, 2 per job for each student

OBJECTIVES

- Students should be able to assess the skills and interests of individuals in preparation for assessing their own skills.
- Students should be able to analyze job skill requirements and match these with the skills and interests of individuals.
- Students should state the characteristics of selected marketing and distribution occupations.

RATIONALE

This unit asks students to examine the components of the career planning process: individual skills and abilities on the one hand and job requirements and characteristics on the other.

The activities focus on assessment of the skills and interests of individuals, analysis of job requirements and on matching job requirements with individual skills. This focus is intended to stimulate the student to think realistically about jobs and about assessing his own skills and abilities.

The two matching exercises differ in several ways. In Activity A, there are six job profiles and six biographical sketches. The jobs are entry-level jobs, similar to those students themselves might take part-time or after graduation. The skills of the individuals in the biographical sketches are described very generally. The task for students is simply to make the best match of people and jobs.

In Activity B, there are six job profiles and twelve biographical sketches. The jobs here are relatively high level; some of them require advanced education and training. The individual profiles are more detailed regarding particular skills. Here, the task for students is to select the best of two candidates for each job, taking the point of view of the employer. The focus on higher level jobs is intended to broaden students' horizons about the possibilities of such jobs for themselves.

CONCEPTS

- The career planning process involves many components, including assessing the skills and abilities of the individual and the requirements and characteristics of the occupations.
- "Skills" include everything a person knows how to do. Examples of skills are: driving a car, writing clearly, following directions, analyzing and solving problems, being courteous, riding bicycles, fixing machines, building houses. etc.
- "Job requirements" refers to the skills the worker must be able to perform; personal skills and attitudes (e.g., courtesy, commitment); and responsibilities the worker must be able to assume (e.g., out-of-town travel).
- Everyone has skills but many people, particularly younger students, do not realize that they have so many and that their skills can be important in the world of work.
- Although it is rare that a perfect fit can be made between an individual and a job, it is in the best interest of both the individual looking for work and the potential employer to achieve the best match possible. This is because a qualified individual is more likely to perform well and to stay on the job.
- Entry-level jobs require simple skills and little or no work experience.
- Characteristics common to many different marketing and distribution occupations include working with people and direct contact with consumers. These characteristics appear in many of the descriptions of jobs in this unit.

ACTIVITY A. *Mix and Match*

Introducing the Activity

1. Define "skills" and "job requirements."
2. Explain to students that in the activity, they will analyze the requirements of various jobs in marketing and distribution and assess the skills of fictitious individuals, in order to make the best match between persons and jobs.
3. Emphasize that people are not pegs which fit into jobs. Perfect fits are not likely. Point out, however, that the combination of what a person can do and what he/she wants to do may fit some jobs better than others.
4. Point out that the job descriptions explain what people actually do. Stress that all of the jobs are in marketing and distribution.

Guiding the Activity

5. Divide the class into groups of six students each.
6. Distribute student instructions and profiles. Emphasize that students should examine the profiles of individuals first, then pick the most suitable job for the individual. Students should make decisions from the point of view of the person in the profile, not from the point of view of the employer.
7. Allow 45 minutes for students to make and discuss their choices.

8. Reassemble the class and ask each group to present their choices and reasons for them. Be sure students discuss reasons for their choices. If students do not agree, be sure minority opinions are expressed. There is no single correct answer.

Learning More From The Activity

The most likely job-people matches are:

Janet Lee–Ace Parking Lot Company C-1

Janet has a driver's license, is pleasant and sociable, desires to work in the city and outdoors.

John Jamison has a driver's license but is not sociable. (Note that students may have difficulty making the match because parking lot attendants are usually men. This may be discussed in the context of job expectations and job discrimination.)

Bob Sellers–Trust-Us Savings Bank D-2

Bob's needs–particularly a desire to advance–are met and he satisfies all three job requirements: he is pleasant and sociable, a high school graduate, and knows how to type.

Bob's experience in his uncle's grocery store makes him competition with Joan Barnett for the supermarket job. But Bob Sellers can type and Joan cannot. That makes Sellers a better candidate for the bank job.

Joan Barnett–Great Foods Supermarket E-3

Joan has already worked as a cashier, an experience in her favor. Joan's desire to work in a bigger place where she'll have a chance to advance is met. She also has a high school diploma, which the job requires.

Richard Browning–Old Faithful Railroad Company F-4

Richard meets the requirements: he has a high school diploma, is young, energetic, and eager to advance. Richard could also meet the Supermarket requirements but this is a better match because of his outgoing personality.

John Jamison–Weego Cab Company A-5

John has a driver's license, is over 18 years old, and has experience as a driver in the Army. John's desire for flexible hours and his preference to keep to himself are met.

Janet also meets the requirements but is better suited to the parking lot job.

Bob Holton–Have-Fun Amusement Park B-6

Bob meets the single requirement: he has a pleasant and attractive personality. Bob's desire not to have a permanent job is met because amusement park work is seasonal. Bob is also suitable for this job because he has run three fairs, a similar activity.

Points to Stress

- Employers may require personal skills and attitudes in addition to purely technical skills, as in the case of Ace which was looking for someone who was pleasant and sociable.
- Job-seekers may be looking for jobs with specific characteristics, as in the case of John Jamison who is looking for a job with flexible hours.
- More than one person can satisfy the requirements of a job; more than one job may be suitable to an individual. Some compromises are usually made.
- Point out that all these jobs are marketing and distribution jobs. They appear in many different businesses. All involve serving consumers needs directly. Most require handling of money.

ACTIVITY B. *We are Pleased to Inform You. . .*

Introducing the Activity

1. Explain to students that, as in Activity A, *Mix and Match*, they will analyze the requirements of various marketing and distribution jobs and the skills and interests of fictitious persons in order to pick the *best qualified* applicant of two for each job.
2. Point out that these jobs require more experience and skills.
3. Stress that in this activity, students should make their choices as an employer would. They should pick the person they think is most qualified.
4. Explain that all of the jobs are in marketing and distribution. They represent many different businesses, types of functions, locations, and levels of responsibility.

Guiding the Activity

5. Divide the class into groups of six each.
6. Distribute student instructions and profiles. These job profiles are detailed and require careful analysis. Allow time and assist students in comprehending their meaning. Select the jobs most suitable to your locale or student interests, if time does not permit doing all six.

7. Allow 45 minutes for students to fill three of the six jobs.
8. Reassemble the class and ask each group to present their choices and reasons. Require students to explain the advantages of their choice over the other applicant. There is no right answer.
9. Reconvene the groups to fill the other three jobs.

Learning More From The Activity

Have students report strengths and weaknesses for each candidate for each job. To guide the discussion, key points are summarized below.

1. **Floral Designer**	**Strengths**	**Weaknesses**
Rose Inchley	Long-term interest; meets most requirements, customer experience	Not middle-aged; no building decoration experience
Brad Buckley	Middle aged; meets most requirements	Dislikes florist shop work; no floral arranging experience
2. **Manager, Financial Institution**		
Elmer Gantry	Experienced	Limited to one department
Pauline Swane	Broad experience with much directly related responsibility	In banking only 3 years
3. **Public Relations Person**		
Joe Bloom	Outgoing and aggressive; has worked in public relations; knows the community; has selling and writing skills	
Elizabeth Bloomfield	Studied public relations; good public speaker; she knows the community; skills in writing and display	Never worked in public relations
4. **Buyer, Cattle**		
John Tonner	Knows all about cattle raising from breeding to selling; years of experience	Never worked in the cattle buying business
Tim Redford	15 years experience in all aspects of the cattle (and hog) buying business	He has been both a cattle *and* hog buyer. Does he know the cattle buying business better than G.P.W.'s present buyer?
5. **Department Head, Supermarket**		
Richard Winwood	Good work as an assistant department head and is good enough to be promoted to department head; learns quickly on the job	Has not worked as a department head, no canned foods experience

Janet Outwood	Leadership ability; department head for 5 years	No canned food experience. Another consideration: What does her present dissatisfaction mean?
6. **Fashion Coordinator**		
Ellen Flintstone	Five years experience; good references	No experience working in a large department store
Alyce Jones	Studied fashion coordination; experience as an assistant fashion coordinator; works in a large department store; good references	No experience as fashion coordinator; worked for only one year

Point out that in each case, each of the candidates for the job has certain characteristics needed on the job and lacks others. For example, in the fashion coordinator sketch, the trade-off is between Ellen Flintstone's greater experience, and Alyce Jones' experience in a larger store. In the case of financial institution manager, both candidates appear to have the required skills. One, however, has more enthusiastic recommendations. Students should also consider that this second candidate is a woman who is applying for a job traditionally reserved for men, and should be encouraged to explore their own feelings about women working in such jobs.

Points to Stress

- Point out that skills and abilities beyond purely technical skills are usually required. This is especially true of higher level jobs in marketing and distribution. Some of these required non-technical characteristics include: motivation to do the job well, enthusiasm about the career, desire for advancement, and leadership ability.
- Note that all these skilled jobs are in marketing and distribution.
  a) Management responsibility is common to two (2 and 5).
  b) Sales promotional work is common to three (1, 3 and 6).
  c) Experience and good references are required.
  d) Knowledge of the work and/or product is necessary.
- Employers may choose a person with ambition and enthusiasm over a more experienced or more skilled person.

Performance Criteria

Students should identify at least one skill requirement for each job and the matching skills of the person selected as most suitable for that job. Minimum performance. suitable matching for at least four of the six jobs in each activity.

Assess groups' choices against these criteria.

RESOURCES AND REFERENCES

Belanger, Laurence L. (consultant). *Occupational Exploration Kit*. Science Research Associates, 259 East Erie St., Chicago, Illinois 60611 Set of 400 illustrated occupational briefs and booklets describing careers. *Occuscan* device enables student to identify occupations based on student's achievements and objectives.

"Career World." Curriculum Innovations, Inc. 501 Lake Forest Ave., Highwood, Illinois. Magazine that examines different careers each month. Magazine also included interviews and sources for further investigation.

Feingold, S. Norman and Swerdloff, Sol. *Occupations and Careers*. New York: McGraw-Hill, 1969. (p. 208). Student test designed to help student explore information about occupations; includes discussion of what student must learn about self.

Hopke, William E. (ed.) *Encyclopedia of Career and Vocational Guidance*. Vols. I & II. Chicago: Ferguson, 1972.

Murphy, James M. (comp.) *Handbook of Job Facts*. Chicago: Science Research Associates, 1972. Concise summaries of basic information on over 200 major occupations.

UNIT 3: THE IMPACT OF WORK ON LIFE STYLE

Teacher's Guide

OVERVIEW

ACTIVITIES	MATERIALS
A. *Career Choice for Personal Satisfaction*	
Focus is on the influence of work on life style and of life style preferences on occupational choice.	
a. For each of two fictitious persons, students select a job which best satisfies the life preferences of each.	2 People Profiles and 6 Job Profiles for each student.
b. Partners role-play a fictitious job seeker and a counselor. Together they choose the job which best satisfies the individual's life style.	Instructions to all students. 1 People Profile and 3 Job Profiles
Partners switch roles, using new profiles.	1 People Profile and 3 Job Profiles
B. *The Working Mother*	
Examine the influence of off-the-job responsibilities on career decision-making. Focus is on the population which exemplifies this issue: women with children. Students interview their mothers and local employers to examine the adjustments made by each when homemaking and child care responsibilities are combined with employment. Mothers enjoy being interviewed.	Interview Guides for Mothers and for Employers

OBJECTIVES

- Students should be able to identify job characteristics which have impact on the individual's total life style.
- Students should understand the impact of work or career on personal satisfaction.
- Students should be able to assess specific jobs in terms of the personal satisfaction each offers to individuals with given life style preferences.
- Students should be able to identify the effect of off-the-job demands and responsibilities on the initial decision to work and on the choice of specific jobs, particularly as they affect women with homemaking/child-rearing responsibilities.

RATIONALE

This unit requires students to examine the impact of work or career on an individual's life style. Students must assess occupational choices in the broader context of overall personal satisfaction. This assessment requires an analysis of:

a. on-the-job characteristics (e.g., what you do, who you interact with, etc.)

b. off-the-job life style influenced by one's job (e.g., overtime required, travel, salary, location and the impact of these elements on family and social life, and leisure needs).

In performing this assessment, students are encouraged to adopt a broader and longer-range view of work beyond an immediate post-graduation job and the salary it offers. Students will thereby be assisted to understand the importance of thoughtful occupational choice and to develop techniques for intelligent decision-making.

This unit elaborates the theme introduced in Unit 2. There, students match individual characteristics in terms of interests and skills with job characteristics. Here, individual preferences are drawn more broadly in terms of preferred life style elements and job characteristics including off-the-job implications. Students actually evaluate jobs in terms of the degree to which they are likely to produce personal satisfaction for specified individuals.

The second half of this unit is concerned with off-the-job demands and responsibilities and the impact of these demands on life choices; e.g., to work or not to work, what kind of work, how much to work. The focus of this examination is on women with homemaking and child-raising responsibilities. The reasons for selecting this particular focus are: 1) that the impact of work on off-the-job demands and conversely, the impact of off-the-job demands on work are well-illustrated in this particular population; 2) the balance between the responsibilities of women as homemakers and parents and women as workers is an active social issue; and 3) students should be aware of alternative career plans, such as *not* working during child-raising years, and the impact these choices have.

CONCEPTS

- "Life style" is used to describe how an individual lives and what he/she likes to do. For example, life style preferences include working flexible hours, working outdoors, having weekends free, traveling on business, traveling for pleasure.
- Obtaining satisfaction from work is becoming more important to growing numbers of people. A job is an important component of one's life style. Conversely, selecting a job to fit one's life style is an important element of occupational choice.
- The contribution of work or career to an individual's overall personal satisfaction derives from two components:

  a. the characteristics of each job (e.g., what you do; who you work with).

  b. the influence of work on one's off-the-job life style (e.g., the impact of overtime, salary, travel and location on family and social life and need for leisure time).
- In matching his/her own interests and abilities with a job, an individual should analyze his skills, his life style, his off-the-job responsibilities, and the kinds of things that will give him satisfaction on the job.
- Occupations in marketing and distribution are extremely diverse. A variety of life style preferences may be satisfied by these occupations; many different skills are suitable to marketing and distribution occupations.
- The idea that perfect fit between people's needs and job requirements can be found is unrealistic. An occupation will satisfy some needs but not others.
- Compromises or trade-offs are therefore required. Individuals must decide which of their needs are most important and which may be compromised. This is often called setting priorities.
- Some life style preferences or needs are more

flexible than others. For example, an individual may be unable to travel because of family responsibilities but willing to accept a lower salary because a job represents a good opportunity for future advancement.

- The impact of work on life style is clearly illustrated in the case of women who undertake both careers and responsibilities for homemaking and child rearing.
- Traditionally, it has been assumed that men will enter the work force upon completion of their education. Their marital and family status has had no effect on this basic assumption.
- There has been a significant and notable trend in that increasing numbers of women are entering the work force. This phenomenon is particularly evident among women with children. See Table A, **Mothers Who Work**.
- There are essentially two reasons why people work: money and personal interest. People work because they have to subsist or because they want to fulfill an interest or improve their life styles. Of course, many people work for both reasons.
- Women who work do so for the same two reasons. A single parent, mother or father, may have to work out of necessity. A woman with children may work in order to increment her husband's income so that the family can improve its life style, or a mother may work because she gains satisfaction from doing so.
- When a woman with a family enters the work force after an absence, changes occur in the life of the family. For example, more money may be available. A different division of household labor often occurs. Family schedules may be adjusted, etc. Child-care arrangements may have to be made.
- Employers sometimes make adjustments to accommodate women. For example, some employers may provide child-care facilities or adjust work hours and schedules to fit off-the-job responsibilities of working mothers.
- Society has begun to make adjustments to increasing numbers of working women. For example, demand for equal opportunity for jobs for men and women and equal pay for equal work is related to the increased number of women in the work force.
- Although all working people have off-the-job demands (for example, providing for and taking care of a sick parent) women with child-raising responsibilities traditionally have been expected to drop out of the labor force to meet them, while men have been expected to make adjustments to these demands and, at the same time, to continue working.
- The decision of a mother *not* to work is a valid one. What is noteworthy is that increasing numbers of women are considering the decision to work as viable as the decision not to work.
- Household work, i.e., the care of children and home, requires skill and involves work.
- Many women choose not to work outside the home during child-raising years and therefore drop out of the work force for that period until their children reach maturity.
- The fact that a woman does not work during child-raising years may have a significant impact

Table A

MOTHERS WHO WORK, 1950-1970

	1950	1960	1970
Mothers Who Work	8.5 Million*	12.2 Million	18.4 Million
Children over 18	5 Million	5.7 Million	8 Million
Children of school age (6-17)	2.2 Million	4 Million	6.4 Million
Children under 6 Years	1.3 Million	2.5 Million	4 Million
Mothers Who Work As Percent Of Married Women	24%	30%	41%
Percent of Total Employee Work Force	14%	20%	25%

*Figures are approximate.
Derived from *Statistical Abstract of the U.S.*, Department of Commerce, 1972.

on her ability to return to a particular job or career. Having dropped out of the labor market for a period of time, she may find that she must re-enter her job field at a low salary level or a lower level of responsibility.

- In considering particular jobs and careers, married women and women with children look into the flexibility of schedules, availability of part-time work, the requirements for overtime work, requirements for travel, and availability of child-care facilities, among other things.
- Many marketing and distribution jobs are filled by women employees partly because flexible schedules are often available.

ACTIVITY A. *Career Choice for Personal Satisfaction*

Introducing the Activity

1. Review terms: life style, personal satisfaction, trade-offs, priorities.
2. Lead students in a listing of life style elements (leisure time needs, family life, travel, entertainment, interest in work, and so forth). Ask students to indicate what is important to them.
3. Ask students to identify what is most important to them–activities or values they would not consider giving up, even for a high-salaried job.
4. Discuss with students some of the responsibilities which may prevent an individual from choosing an occupation (e.g., inability to travel because of need to care for an ill relative).
5. Point out that students have already observed the influence of life style preferences on occupational choice: e.g., Bob Holton in Unit 2, Activity A, wanted a job that was not permanent so that he could continue his primary work (though volunteer) with young boys.
6. Explain that in this activity, students will make occupational choices to satisfy the life style preferences of fictitious individuals. Stress that they might have to compromise.
7. Alert students to life style preferences to watch for: salary needs, hours of work, willingness to work overtime, willingness to travel, desire for career advancement, product interest, and so forth.
8. Explain that the activity has two parts.

   a) Students read and discuss descriptions of people and jobs.

   b) Students role-play people seeking jobs.

Guiding the Activity

9. Distribute People Profiles 1 & 2 and Job Profiles 1-6 to each student. Emphasize that the objective is for students to select the job that would be most satisfying to the fictitious individuals, Terry and Pat.
10. Give students at least 20 minutes to read the materials; more time may be necessary. Offer to clarify elements of life style for each profile; clarify aspects of the jobs which relate to Terry s and Pat's life style needs.
11. Divide the class into groups of 5-6 to choose the job which best suits Terry's and Pat's life style needs.
12. You may prefer to conduct this as a class discussion. In that case, permit time for students to explain the basis of their choices.
13. Ask each group to report its choices and the reasons for them.
14. **Role Play**: Divide the class into pairs of students. One partner will act as the job seeker; the other as the counselor. Then, new profiles will be distributed and partners will switch roles.
15. Distribute Instructions to All Students, Profile of Chris, and Job Openings.
16. Emphasize that each pair should discuss the merits of each job in terms of the preferences of the job seekers. Ask students to record the job they agree would be most satisfying for the job seeker.
17. Allow time for students to read the material.
18. Role play should take about 20 minutes. Role plays may be unfamiliar to some students and therefore you may have to spend more time explaining that students should act as if they are the people described in the profile.

    Circulate to see that job seekers are actually following the description in their profile and that counselors adopt a helping attitude.

    The first round will probably proceed slowly until students become familiar with the material and with playing. Be patient, the action will pick up.
19. Partners switch roles.
20. Distribute profile of Jo and Job Openings.

Learning More About the Activity

1. Have students explain the reasons for their choice. Include the advantages and disadvantages of jobs they rejected for each person.

Terry #1 **F. Houston Wiley, Ltd. Advertising Firm Sales Representative**

Advantages: Sales work; good salary; opportunity for advancement
Disadvantages: travel required–2 days per month; relocation required for advancement

#2 **Safe, Inc. Insurance Company Insurance Representative**

Advantages: sales work; no travel; opportunity for financial success
Disadvantages: salary low; risk on commissions

#3 **Hospital Supply Central, Inc. Wholesale Supplier Management Trainee**

Advantages: work in the field; sales work; opportunity for advancement; no travel
Disadvantages: relocation may be necessary to advance; lower salary than desired

Pat #4 **The Drums Book Store Manager**

Advantages: book store; sales work; management; opportunities for advancement; responsibility and freedom to make decisions; small business
Disadvantages: low salary

#5 **XYZ, Inc. Department Store Assistant Buyer, Book Department**

Advantages: book department; opportunities for advancement; small department
Disadvantages: large business; less independence (reports to supervisor), salary not high

#6 **Historical Society Brochure Writer**

Advantages: writing; sales work; small "business"
Disadvantages: no advancement opportunities; low salary

Chris #1 **Historical Society Brochure Writer**

Advantages: writing (English teacher); history; illustrations; creative job; temporary job
Disadvantages: overtime

#2 **Avant Art Gallery Art Gallery Sales Clerk**

Advantages: art; creative job
Disadvantages: low salary; sales work

#3 **Look Here Photo Studios General Manager**

Advantages: creative job; photography; no overtime required
Disadvantages: sales work; supervision of others

Jo #1 **Mighty Burger, Inc. Restaurant Chain Checker**

Advantages: works alone; food business; no overnight travel
Disadvantages: salary; report-writing after work hours

#2 **Sports Unlimited Wholesale Store Sales Representative**

Advantages: sports; no overtime; small business
Disadvantages: not in field; low salary

#3 **All Foods Supermarket Supermarket Meat Department Manager**

Advantages: familiar work (meat department); adequate salary; good fringe benefits
Disadvantages: supervises employees; undesirable hours

2. Point out to students that there are no "right" or "wrong" answers. However, some jobs are more obviously inappropriate for some people (e.g., Jo would not enjoy a sales job which requires extensive interaction with other people), or more obviously appropriate for others (e.g., Pat could be highly satisfied as manager of a branch store).
3. Ask students to discuss whether they would have made different choices if fewer considerations had been included. For example, if starting pay were the only consideration, would some job seekers have selected a different job from the one they chose?
4. Ask each student to consider each of the jobs presented in terms of his or her *own* personal preferences and to select the one *most likely* to satisfy him/her. Students should also consider how satisfying their choice might be in the larger universe of possibilities rather than simply in terms of the best of the jobs given.
5. Ask students to explain the trade-offs they made: how they decided a job which satisfied some preferences was more desirable than another; how they decided that particular preferences were more important than others.

Points to Stress

- Common elements of life style are important to consider (e.g., interest in the product/type of work, salary structure, opportunities for advancement, time required on the job, level of responsibility, travel required/possible, opportunities to learn and/or to increase skill levels, etc).
- Highlight the concept of trade-offs and compromises in achieving the best overall selection of job or career. Stress the necessity to make priorities among preferences since it is virtually impossible to achieve the "perfect" job.
- Point out to students that work occupies the largest portion of an individual's time in a day or week and that dissatisfaction on the job means a person is unhappy the majority of his waking hours. (Ask students if they know of any people who changed to a low-paying job in order to work in a setting they preferred.)

Performance Criteria

Students should identify at least one life style preference for each job seeker and the matching characteristics of the job chosen as most suitable for that person. Minimum performance: suitable matching for at least three of the four job seekers.

Each pair will record the most satisfactory job for each job seeker, and the reason(s) for the choice in terms of life style elements.

ACTIVITY B. *The Working Mother*

Note that this exercise is designed particularly for students in communities where the working mother is a relatively recent phenomenon; where job and homemaking responsibilities have traditionally not been combined. It was found that one of the major benefits of this activity was that students talked to their parents about what they do and why. Mothers enjoyed this.

Introducing the Activity

1. Explain to students that the purpose of this exercise is to emphasize not only that job choice is influenced by life style, but also, that the initial decision to work or not and the kinds of work one does are influenced by the demands of one's off-the-job life.
2. Students will examine the trend of increasing numbers of women with families entering the work force and the adjustments made by women themselves, by their families, and by employers.
3. Explain that the exercise focuses on the examination of three issues:
   a. How is the threshold decision to work or not to work influenced by the demands of one's off-the-job life?
   b. What kinds of work situations are most compatible to women with homemaking and child-raising responsibilities?
   c. What are the adjustments that women with homemaking and child-raising responsibilities, their families, and their employers make when these women work?
4. Discuss the students' own experience and expectations concerning women who work:
5. Ask students such questions as:
   - Do students expect to work throughout their lifetime? (Note whether male students substantially outnumber women here.)
   - Do female students expect to work until marriage or parenthood and not thereafter?
   - Do students in the class have substantial responsibility for assisting at home? Are these students whose mothers work?

The response of students to these questions will depend on their experience and background and will vary from class to class. By making student expectations explicit, you can help students to recognize their own biases, without seeking to alter them, and thereby may help to reduce the intrusion of their own value judgments in the performance of the exercise which follows.

Guiding the Activity

6. Distribute each of the two interview guides to each student.
7. Assign each student the task of interviewing his/her own mother and also one employer in the community. To assist students in interviewing employers, select businesses that generally employ large numbers of women.

   Arrange appointments in advance for students; enlist the career education resource person if your school has one.

   If students live in remote areas try to arrange for interviews during school time or, if all else fails, invite employers to be interviewed in class.
8. Review the interview instructions and guides. Be sure students understand them. Emphasize courtesy.

Learning More About the Activity

1. Have students discuss what they learned from the interviews. For example:
   - What reasons did mothers give for working/not working?
   - Did any employers make special provisions for mothers who work (e.g., child care, extra sick leave for when children are ill)?
   - What kinds of jobs did mothers hold? What kinds of schedules (e.g., part-time) did they follow?
   - What household arrangements were made by women with children who work (e.g., household help, child-care centers, sharing tasks with other members of the family)?
2. Ask students to try to identify any patterns such as:
   - differences in the work patterns of women with pre-school children vs. women with school-age children.
   - common reasons for not working among women who would like to (e.g., no child care arrangements).

   Emphasize the points; do not spend excessive time on counts of *how many*.
3. Have the class list the jobs which seem most congenial to women with families (e.g., real estate, part-time retail sales clerks, etc.). These should be drawn not only from the jobs their interviewees held or from marketing and distribution alone but also those they can think of based on their understanding of the needs/desires of these women.
4. You might suggest that students investigate the numbers of women with families who work at present; the percentage of the total work force and of all mothers that this represents; and the trend over the last thirty years. For brief presentation by you, use the figures presented in the chart which appears in the Concepts section of this unit.
5. Students might be encouraged, if interested, to investtigate the equal opportunity movement among women and the Federal government's activities in this area.

Points to Stress

- Personal responsibilities and demands influence occupational choice.
- Responsibilities for homemaking and child care have traditionally limited a woman's freedom/desire to pursue paid employment.
- Homemaking and child care represent work and require skill.
- Increasing numbers of women are combining the responsibilities of home and work.

Performance Criteria

Students will identify at least three factors in the home which affect a mother's ability to work, and at least three aspects of jobs which affect her ability to function as a mother/homemaker.

After the discussion, have students list home and job factors, and the impact of one on the other.

RESOURCES AND REFERENCES

"Counseling Women for Careers in Business." U.S. Dept. of Labor Women's Bureau, Washington, D.C. 20210. Article written for school and business personnel describes ways women can be counseled and encouraged to prepare for business careers. Includes discussion of projected business openings.

"51%" Robert Drucker & Co., 10718 Riverside Drive, No. Hollywood, Calif. Three short sequences that illustrate problems of women in employment.

"Jobs and Gender." Pleasantville, N.Y. Guidance Associates. Filmstrip cassette set that explains how sexual stereotypes have influenced career choices.

Life Career Game. Detailed simulation of four areas of society that affect a student's planning for future: education, vocation, leisure and family. Students decide how to spend "life's" time. Game requires 5-10 hours for proper impact. School adaptation available from Ed. Materials Center, Palo Alto United School District, 25 Churchill Ave., Palo Alto, Calif. 94306.

"Making It In World of Work." Filmfair Communications, 10946 Ventura Boulevard, Studio City, Calif. (25 minutes) Film focuses on the relationship between work and life style. Discusses importance of life style goals in career decision-making and includes interviews of young workers in nine different occupations.

Morley, Eileen D. "Women in the Business Environment." Boston, Ma: Intercollegiate Case Clearinghouse, Soldiers Field, Boston, Ma. 02163, 1972. Statistics on women in labor force, summary of recent changes affecting employment of women, and federal guidelines on sex discrimination and Affirmative Action programs.

Poor, Riva (ed.) *Four Days, Forty Hours*. New York: Mentor, 1970. Articles discuss impact of 4 day work week on leisure and jobs.

Seed, Suzanne, *Saturday's Child*. New York: Bantam, 1973. Thirty-six women talk about their jobs.

Spiro, Melford E. *Kibbutz: Venture in Utopia*. New York: Schocken Books, 1963. Book examines daily life of people on kibbutz and discusses importance of work in their lives.

Stevenson, Gloria. "Career Planning for High School Girls." Washington, D.C.: Department of Labor Bureau of Labor Statistics, Reprinted from "Occupational Outlook Quarterly," Volume 17, Summer 1973. Article details why career planning is imperative for girls, opportunities for women, relationship of career to family responsibilities and possible drawbacks.

Terkel, Studs. *On Working: What People Do All Day and How They Feel About It*. New York: Pantheon, 1974. Working people talk about their work and lives.

"The Myth and The Reality." U.S. Department of Labor Woman's Bureau, Washington, D.C. 20210. (3 pp.) Answers many objections about working women. Concise student reference.

Toffler, Alvin. *Future Shock*. New York: Bantam, 1970. Description of emergence of tomorrow's world and the changes in business, work and life style.

UNIT 4: SELF-ASSESSMENT AND OCCUPATIONAL ANALYSIS

Teacher's Guide

OVERVIEW

ACTIVITIES	MATERIALS
A. *The Future* Students depict their ambitions for their futures in collages and posters.	Magazines, scissors, glue, poster board.
B. *What Else Turns You On?* Students choose appealing jobs from ads and consider what makes them attractive.	Classified advertisement pages from newspapers. Student Instructions and Job Activities and Products List for each student
C. *Who Are You?* Students assess their interests by examining how they actually spend their time and measure their skills by noting how qualified they are already for a variety of jobs.	Student Instructions, List of Interests, Preferences and Abilities, and Skills Identification for each student.
D. *Organizing for a Project* To organize a project, students purposefully apply what they know about their own and their classmates' skills and interests.	

OBJECTIVES

- Students will be able to express their ambitions for the future.
- Students will be able to identify occupations which suit their interests.
- Students will be able to identify their interests, abilities, values and skills.
- Students will be able to identify characteristics and tasks of simple jobs, particularly in terms of relationships to people, ideas and things.
- Students will be able to organize themselves purposefully, consistent with their skills and interests, to achieve an objective.

RATIONALE

This unit derives from the conviction that career planning is a continuous, life-long process, requiring ongoing self-assessment. The pace of technological advances of modern society, associated changes in the structure of work, and continually changing economic situations make it mandatory that a student be prepared to adapt to change. In addition, personal preferences, interests and values change as one develops. Therefore, it is crucial that students develop the skills to recognize personal growth and change and to adapt.

For adolescents, the self-assessment process should, on the one hand, encourage fantasy as a way of experimenting with their own identity and with career options. On the other hand, to assist students to begin to perform adult roles, the realities of career options must be recognized. Adolescence is a transitional stage when fantasy yields to reality. It is important for students to begin evaluating their own interests, skills and values against real world considerations to solidify their growing sense of identity.

Therefore, in this unit students progress from fantasizing about their futures to examining real job opportunities, assessing job characteristics in terms of what attracts them, identifying their own skills as a way of fostering their self-confidence, and organizing themselves purposefully, consistent with skills and interests, to accomplish a task.

CONCEPTS

- The process of determining one's current skills and interests, and potential skills and interests is called self-assessment. There are many ways in which one can assess his/her own interests and skills. One can look at hobbies and the ways in which time is spent. One can take vocational tests to determine abilities and interests inventories to identify preferences. One can experiment with a variety of occupations, using a method called work sampling. One can explore his/her interests by reading about occupations of interest.
- SELF-ASSESSMENT IS A CONTINUAL PROCESS. Interests and skills are constantly changing and developing. Therefore, one should continue to observe what his/her interests and skills are.
- The important process of career planning includes assessing one's interests and skills in relation to the opportunities available in the job market.
- It is important to recognize that everyone has skills and talents.
- Many skills can be acquired through education and training or job experience.
- It is important, however, to be realistic about one's present and future skills and interests, especially in considering potential career opportunities. There are limited numbers of "glamour" jobs and few people who can fill them (e.g., professional athletes).
- Part of the assessment process is examining many potential jobs. In this way, there are enough options to consider the relative advantages and disadvantages of jobs for one's particular skills and interests.
- Every occupation has certain skills and aptitudes associated with it. In addition, the nature of the job is influenced by the environment in which it is found. Some of the things which are usually relevant in a job are: whether or not it requires working with people, data, things, or ideas, whether it is done indoors or outdoors; whether it requires being able to work well with other people; whether it requires formal education and training; whether it requires manual dexterity (ability to work well with one's hands); whether it requires travel; what the working environment is (factory, recreational facility, hotel, restaurant, office, etc.); whether it requires the ability to operate special equipment, and so forth.
- The procedure for determining skills and aptitudes required for successful performance on the job is called occupational analysis. (The Department of Labor has done this for many jobs, and has published the results in the *Dictionary of Occupational Titles.*) In planning a career, in addition to occupation analyzing and/or studying the entries in the *Dictionary*, one should add information

unique to the local community. The *Dictionary* only provides a generalized description which will not correspond exactly to the situation in the community.

- In addition to examining the specific tasks and responsibilities required for a job, other characteristics should be examined. These include such factors as degree of variety found on the job, the degree of challenge offered by the job, the extent of mobility provided by the job, the amount of self-motivation needed for the job, and so forth.
- It is important in determining the suitability of a job to examine one's interests and skills in light of the tasks, responsibilities and characteristics of the job. These are central to career planning for personal satisfaction and go beyond simple questions of salary, hours, etc.
- Among the attractions of marketing and distribution occupations are: working with people, chance for variety (e.g., working in different departments of a department store); lateral mobility; opportunity to work with products of interest; opportunity to use creative talents (e.g., display, design, advertising copy); fringe benefits in the form of discounts on merchandise.

ACTIVITY A. *The Future*

Introducing the Activity

(This activity should be introduced in advance so that you can ask students to bring magazines to class the next day.)

1. Ask students in a class discussion what they would most like to be and/or do and why. Tell them that this is a chance to express their wildest dreams. To stimulate discussion, suggest they name a person they would most like to be.
2. Tell the students that they can express their ambitions by making a collage or poster out of pictures cut from magazines. They may show different aspects of their desired future. Encourage them to include pictures showing their desired home-life, career, leisure activities and hobbies.

Guiding the Activity

3. Students will be working on this activity on their own and need little teacher guidance. You may run this activity either in class or as a homework assignment.

   Plan to display the collages on the bulletin board.

Learning More From the Activity

1. Ask students to show what pictures they chose and to explain why in a class discussion.
2. Note whether many students chose the same kinds of pictures (e.g., many students choose pictures of athletes) and briefly discuss why they share those desires.
3. Note whether males and females chose different kinds of pictures, (e.g., football players vs. nurses), and discuss why.
4. Note whether students emphasized careers vs. leisure activities vs. social or family life. A discussion on the role of work/leisure might be in order.

Points to Stress

- Many people have dreams about their futures. Eventually, they adjust these to reality. Not everyone can be a sports hero or a movie star.
- Setting realistic goals is an important part of maturing.

ACTIVITY B. *What Else Turns You On?*

Introducing the Activity

(This activity should be introduced in time to ask students to bring newspapers to class for it.)

1. Explain to the class that achieving career goals depends in part on what kinds of jobs are available.
2. A good source of available jobs is the classified advertisement section of the newspaper.
3. Ask each student to look through classified ads for the three jobs which are most attractive to him/her. Note that not all jobs are likely to be advertised. Also point that job descriptions vary in detail and that each week different jobs may be advertised.
4. Ask each student to circle or cut out the jobs that turn them on and list the reasons why.

Guiding the Activity

5. Distribute the Instructions and Job Activities and Products List to each student.
6. Discuss student choices and what they like about these jobs. To assist them, there is a list of job features on their instruction sheets, including *variety*, *risk*, etc.

   During the discussion stress that besides salary, there are many intangible features of jobs which attract employees.

7. Introduce the people/things/ideas scheme for examining jobs. Point out that virtually all jobs involve working with people, things and ideas but that the emphasis varies from job to job.
8. Explain that students will be working with action words, i.e., what people actually do in jobs, on the Job Activities and Products List.
9. Students then use their Job Activities and Products List and
   a. Circle terms that best describe the jobs they chose.
   b. Check action verbs and products that appeal to them.

Learning More From the Activity

1. Ask students to compare the jobs they chose from the classified advertisements with their collages (refer back to Activity A–The Future) in a class discussion.
2. Reiterate that certain kinds of jobs do not usually appear in such ads (e.g., athletes; movie stars; doctors).
3. List on the board the job aspects and activities that students find appealing. Point out that the satisfactions gained from what people actually do on the job are as important as money.
4. Note especially the marketing and distribution jobs included in student choices. Categorize student choices to see whether the selected jobs cluster in certain fields.
5. Ask students whether their parents/friends hold similar jobs to the ones they picked.

Points to Stress

- Career planning and occupational choice should take into account a) what a person actually *does* on the job b) intangible features.
- Though important, salary, hours, etc., do not *describe* what the work day is like; a person must know that to make judgments and choices.

ACTIVITY C. *Who are You?*

Introducing the Activity

1. Explain that in this activity, which has several parts, students will be looking at themselves: what they are interested in and what they can already *do*. Note that, although people think they know themselves, it is helpful to be specific by examining how they actually spend their time.
2. Note that students may be surprised to find out all the skills they already have and that they will be looking at what they can do already.
3. Point out that at the end of this activity, each student will have a profile of him/herself (similar to the biographical sketches they have seen in preceding units).
4. Note that what people actually do with their time often expresses their interests more accurately than what they say they like to do.

Guiding the Activity

5. Distribute Instructions, Skills Identification Sheets and List of Interests and Abilities to each student.
6. Students circle the items that describe how they actually spend their time on the Interests and Abilities list.
7. Students indicate why they are *not* doing the things they want to do at the bottom of the list.
8. Discuss students' assessment of interests.
9. Students check off their skills on the Skills Identification sheet.
10. Students then analyze the list of jobs in their Student Instructions (#5) and, in a class discussion, determine what skills each job requires and which of these skills they now have.

Note that the task descriptions for the first three jobs on this list (ticket seller, parking lot attendant, cashier-clerk) already appear in Unit 2. Activity A.

Learning More From the Activity

1. Ask students to describe the skills required for each job in #5 on their Instruction Sheets. Discuss the skills various students already have that would enable them to do these jobs (at least in part) now.
2. Ask students to tell the class what additional skills they already have.

Points to Stress

- Individual skills develop over time.
- Interests and preferences of individuals change.
- These changes go on throughout life. Sometimes changes in interests, skills and preferences are such that individuals become dissatisfied with their careers and seek a change.

ACTIVITY D. *Organizing for a Project*

Introducing the Activity

1. Explain that almost all human activity requires that the skills and interests of individuals be organized in a purposeful way. Families, businesses, projects, clubs, governments, etc., organize to accomplish their goals.
2. In this activity students will be organizing themselves to accomplish a project. The procedures they go through in organizing (i.e., identifying tasks that need to be done; identifying skills needed to perform each; selecting people to perform each job), follow the same principles that operate in real-world enterprises.
3. Ask the students to note how many different tasks are required to achieve a goal; how many different skills are needed and how people are selected/volunteer to do their share. They will discuss these factors after the exercise.
4. Alert students to the need for leadership. They may select a leader; acquiesce to a leader; share leadership equally by group decision-making.

Guiding the Activity

5. Divide class into groups of five or six; have each group select a project from a list you have developed, e.g., organizing the community to clean up a littered field, setting up a student car wash; collecting toys for the local hospital. These may be hypothetical or related to real, ongoing projects in your school or community.
6. Each group is to organize its members to do its project. Decisions to be made include:
   a) tasks that need to be done
   b) skills needed
   c) assignment of students to each task.

   Each student should have some role in the organization.
7. If necessary, act as a catalyst in helping students identify tasks and skills.
8. After 30 minutes, reconvene the class.

Learning More From the Activity

1. Have a representative from each group present to the class the work plan developed by the group. Have the class identify common features of the work plans, (e.g., selection of a leader, the fact that everyone had a skill to contribute to the plan, and so forth). For groups organized for the same projects, compare how they define tasks. For example, did each group plan to advertise the car wash service? How did they intend to do so?
2. Ask each group to describe how it assigned/selected/accepted people for different tasks. Did students volunteer to do some jobs based on their interests? Did some students suggest others for particular tasks based on their recognition of that individual's skills (e.g., "John ought to do the posters. He's a great cartoonist!")?
3. Ask students how much they know about classmate's skills and interests.

Points to Stress

- "Getting the job done" requires purposeful organzation of people with the needed skills and abilities. This is true for projects, for businesses, for all types of endeavors.
- Individuals know a great deal about the abilities and interests of their associates.

Performance Criteria

Students should identify at least three of their skills and three of their interests.

Students should identify at least two job requirements for each of the jobs in Activity C.

Students should be able to identify at least one skill or interest of theirs, which they had not previously been aware of.

RESOURCES AND REFERENCES:

Arnold, Arnold. *Career Choices for the 70's*. New York: Crowell-Collier Press, 1971. Book that helps student evaluate aptitudes and interests relative to career. Includes information on educational routes to careers.

Dillon, Donald. 'Toward Maturing Personal and Job Characteristics." *Occupational Outlook Quarterly*, Vol. 15, No. 4, Winter 1971 (cover says Winter, 1972). 268 occupations are cross referenced with 25 personal and occupational characteristics. Helpful to young people in making career decisions.

Holland, John L. "The Self-Directed Search: A Guide to Educational and Vocational Planning," Palo Alto, California: Consulting Psychologists Press, 577 College Avenue, Palo Alto, 1971. Program that helps student assess interests and skills and locate small group of occupations for further consideration, based on interest and skill assessment.

"Why Work At All." Pleasantville, N.Y.: Guidance Associates. Filmstrip-cassette kit stresses relationship between personal goals and work.

UNIT 5: EXPLORING BELIEFS AND VALUES IN CAREER DECISION-MAKING

Teacher's Guide

OVERVIEW

ACTIVITIES	MATERIALS
A. *In the Interest of. . .* Students role-play opposing positions of consumers and businesspersons around selected issues. In so doing, they explore their own beliefs and values in terms of the respective rights and responsibilities of businesses, consumers and employees. Emphasize the arguments in support of each side in each situation.	Role-play 1: one role to each partner in a pair of students. Role-play 2: to each partner in each pair of students, distribute one of the two role profiles. Role-play 3: same as #2 above.
B. *What Would You Do?* Students examine dilemmas from the point of view of the individual decision-maker in marketing and distribution occupations. Emphasize the choices facing the individual decision-maker.	4 situation descriptions: distribute the four to each student.

OBJECTIVES

- Students will understand the relationship between personal beliefs on the one hand, and occupational choice and job satisfaction on the other.
- Students will understand their dual roles as consumers and workers and the different needs associated with each role.
- Students will explore ethical issues which sometimes confront employees and employers.

RATIONALE

Just as it is important to foster the growing sense of identity of adolescents through examination of their skills and interests, it is important for students to explore the belief system which governs their behavior. Beliefs and values influence the way in which students respond to schools, parents, friends and the society at large. It is important for students to recognize that these beliefs and values also operate in career decision-making and will influence individual satisfaction with a career choice. Personal satisfaction with work derives in part from compatability of the individual with the purposes and practices of the occupation and industry in which he/she works. The individual's identity is best supported by consistency between the requirements or opportunities of an occupation and the individual's value system.

In this unit, students examine and articulate their beliefs and values as they relate to problem situations in the field of marketing and distribution. There is no intent to preach any "right" or "wrong" solution to any situation but rather to expand the student's horizons by making explicit his/her implicit views which influence choices. The specific situations chosen in the unit focus primarily on the respective rights and responsibilities of consumers, businesses and employees. They are intended to be used as springboards for discussion in order to elicit from students expression of their own beliefs and values. By making these beliefs and values explicit with respect to situations in marketing and distribution, students should be better able to assess the field as a potential career choice.

CONCEPTS

- An important part of the career planning process is determining whether occupational roles and tasks fit one's belief system and values.
- An individual should therefore identify his/her beliefs and values to be able to assess their relationship to different work environments, practices and roles.
- Personal satisfaction is enhanced if an individual's responsibilities and tasks at work are consistent with the individual's beliefs and values. A problem arises when an individual's beliefs as a person are contradicted by what he/she does in his/her work. Work which requires an individual to participate in activities he/she personally rejects is not suitable work for that individual. For example, a person concerned with protecting the environment might choose not to work in a manufacturing plant which pollutes the atmosphere.
- In marketing and distribution, ethical and social issues often center on the respective rights and responsibilities of consumers and businesses.
- The interests of consumers and of businesses differ in a natural way. Consumers seek to purchase goods and services at the lowest prices; businesses seek to sell the highest volume of goods/services at the highest possible prices. Both positions are valid. This is not a question of right or wrong, only of proper self-interest.
- Because of the variety of types of products and services at different prices, available from many establishments, consumers usually find businesses which serve their needs. Because of the variety of consumer needs and income levels, businesses attract consumers who are satisfied by their products and services. The system is thus generally kept in balance.
- Laws and regulations exist to protect both the rights of businesses and the rights of consumers, in order to insure that in the pursuit of self-interest, one party does not infringe the rights of the other.
- An example of the different interests of consumers and businesses may be found in the use of advertising. A business advertises the advantages of its products or services and minimizes any disadvantages; the consumer seeks to learn about both the advantages and disadvantages of the goods and services.
- Career decision-making requires an understanding of the rights and responsibilities of businesses, employees and the public.
- Individuals must understand the difference between acceptable behavior in pursuit of self-interest and behavior which does not conform to ethical standards. Business organizations as well as individual employees are subject to these considerations.

- Each individual must define for him/herself the limits of his responsibility to his/her own beliefs and standards of behavior, to the employer, and to the public.
- In all fields, employees and employers sometimes face ethical dilemmas. In these situations, the interests of the individual, the business and/or the public are in some degree of conflict. Resolution of these dilemmas is difficult and unlikely to satisfy equally the interests of all parties.

ACTIVITY A. *In the Interest of. . .*

Introducing the Activity

1. Workers in all business are increasingly confronted with the "consumerism" movement which has made consumers, producers, and marketers more and more aware of product deficiencies and hazards, unsubstantiated advertising, overpricing, and so forth.
2. In addition, in response to the demands of consumer groups, local, state and federal laws have been tightened to protect the consumer. Such laws have raised standards for accurate and complete product labeling, product safety, and support of advertising claims.
3. For the worker and businessperson, however, personal responsibility goes beyond issues of legality. Issues relative to ethical standards of behavior must be addressed. Examples of these issues include:
    - Should a retailer push a high-profit item rather than one which offers more value for money to the consumer?
    - What is the seller's responsibility for a product's safety and quality?
    - Should a salesperson try to convince a customer to buy a product which gives the salesperson a higher commission, over the one the customer says he wants?
    - What is a firm's responsibility in advertising even within the law?
    - Do inflated or misleading claims, not strictly illegal, harm the interest of the consumer? Are they ethical?
4. Emphasize that consumers and businesses have the responsibility to pursue and protect their own interests. The phrase "Buyer Beware" reflects a widespread belief that people have enough choice in the marketplace to buy what suits their needs; nobody is forced to buy a poor product.
5. In recent years, consumers have increasingly demanded that businesses share the responsibility for insuring high standards of quality.
6. It is difficult to assign responsibility for instances of inadequate quality. The "seller" of a hazardous product did not produce it; is not the manufacturer responsible? The manufacturer makes the product because people buy it; is not the consumer responsible?
7. Advertising is another example of controversy. Some people believe it is a waste of money which adds to the cost of products and services; some feel it is often misleading. However, advertising is useful in introducing people to a variety of products.
8. These issues are complex. Everyone is entitled to his/her opinion.

Guiding the Activity

9. Explain to the students that they will role-play situations in which some of these conflicts are explored.
10. Select two students to demonstrate role-play #1. Distribute role profile to each.
11. Brief the role-players on the purpose of the exercise, namely that each one should develop arguments to support the goals and position described in his role profile.
12. After the role-play, have the class discuss their own arguments for and against each of the positions taken.
13. You should be careful to avoid making your own judgments in each case.
14. Emphasize to students that they should argue the position described in the profile. They will have a chance to explore their own beliefs after the role-play.
15. After the first role-play, pair all students to role-play simultaneously. Then, have the class compare their own positions with those outlined in the profiles.
16. Repeat for the third role-play.

Learning More From the Activity

1. Have students list the arguments which support each of the two positions in each role-play.
2. Emphasize that there is no right or wrong answer. For example, the Neighborhood Consumer Protection Federation is justified in being dissatisfied with

the poor quality of products from Joe's Emporium. Likewise, Joe's Emporium is justified in trying to provide low cost items to customers who cannot afford the higher priced ones.

3. Of particular importance in the discussion is the question:

   - Who is responsible for an individual's actions or choices?

   Emphasize the opposing positions that a) each individual is responsible for his own behavior and b) society should regulate what actions and choices are available to people for their own and society's protection.

4. Reiterate that our personal beliefs and values reflect how we feel about this issue.
5. Beliefs and values are personal to the individual.
6. Most often there is a reasonable justification for each side of an issue which reflects beliefs and values.

ACTIVITY B. *What Would You Do?*

Introducing the Activity

1. Explain to the students that in the following cases they will examine their own beliefs and values and explore how this might affect their solutions to problems in a work setting.

Guiding the Activity

2. Have students read each situation.
3. Ask students to present their decisions in each case, and the reasons for the decision.
4. Discuss the reasons for their individual choices.
5. Consider setting up a debate for students who choose opposing positions to express them formally.

Learning More From the Activity

1. Ask students to consider the consequences of each choice in each situation; some are listed in the chart below.
2. Point out that these types of situations are not limited to marketing and distribution; every field has similar situations peculiar to its activities.

Points to Stress

- An individual's satisfaction with work is enhanced if the decisions of the business and the individual's decisions and activities are consistent with his/her beliefs, values, and ethical standards.
- It is virtually impossible to separate one's beliefs and values from one's actions on a job; consistency on and off the job preserves the individual's identity.
- Beliefs and values govern one's total behavior.

	Choices	**Consequences**
Situation 1:	Drop all possibly hazardous toys	Loss of business from reduced product line
	Keep the toys	Some loss of reputation and possible loss of business; personal guilt if injuries occur in the community
Situation 2:	Drop the dangerous brand	Loss of business and of good relationship with manufacturer; perhaps some good publicity and resulting increase of business
	Keep the brand	Fear of bad publicity or even lawsuit; keep business of those who like the brand but lose other business because of publicity; personal guilt if injuries occur in community
Situation 3:	Recommend Acme	Lose $5; satisfy customer with a better brand
	Recommend Supreme	Get $5; may have dissatisfied customer
Situation 4:	Follow manufacturer's recommendation	Keep happy manufacturer; keep advertising job; lose self-respect
	Refuse to hide the footnote	Loss of job or standing with company; keep personal integrity (acting in accordance with personal beliefs).

Performance Criteria

Students should articulate reasons for positions they took in the situations presented in the unit.

RESOURCES AND REFERENCES

Corwin, Gerry; Corwin, Rick; et al. *Search for Values.* Dayton, Ohio: Pfaum/Standard, 1972. Book of Classroom activities designed to assist students in value clarification. Set of printed spirit masters available with book.

Golding, William. *Lord of the Flies.* Capricorn, 1959. Novel describes society created by boys marooned on island.

Leinwand, Gerald. *The Consumer.* New York: Pocket Books, 1970. Discussion of fraudulent marketing practices in inner-city.

Packard, Vance. *Hidden Persuaders.* New York: Pocket Books. Revealing examination of efforts to affect American buying habit.

Steinbeck, John. *The Pearl.* New York: Bantam, 1963. Novel about a man who finds that peace and happiness are beyond price.

UNIT 6: THE ROLE OF MARKETING AND DISTRIBUTION IN THE ECONOMY

Teacher's Guide

OVERVIEW

ACTIVITIES	MATERIALS
A. *Overview of the Marketing and Distribution Process* Students learn basic ideas and concepts by exchanging goods in class.	Information Sheet for each student.
B. *Channels of Distribution* Students study channels of distribution and put in sequence business functions from production to consumption.	Information Sheet; Exercise
C. *I'll Buy It* Students actually move a product from producer to consumer in a walk-through exercise in class in which teams perform marketing and distribution functions.	
D. *Simulation* Students create their own economic system to learn possible routes for moving a raw material in the hands of a producer to a finished product in the hands of a consumer.	SIMULATION PACKET

OBJECTIVES

- Students will be able to describe steps or links of the process by which goods are moved and processed from raw materials into finished products for final delivery to the consumer.
- Students will be able to identify conditions which alter or modify the specific roles and functions which comprise the marketing and distribution process.
- Students will demonstrate their understanding that the functions and roles which are a part of this process are highly interdependent.
- Students will be able to define channels of distribution, producer, wholesaler, warehouser, processer, retailer.

RATIONALE

The purpose of this unit is to acquaint students with the role marketing and distribution activities play in our economy and with the functions and occupations involved in the fulfillment of this role. The unit demonstrates in capsule form the typical flow of marketing and distribution processes associated with the movement of goods from the producer to the consumer. It also demonstrates the fact that the details of the process are altered and modified by exogenous factors such as economic conditions, geographic factors such as distance, and technologies.

The central concept which this unit illustrates is the interdependence of functions and the consequent "vulnerability" of actors in the process. That is, if a function in the process is impeded, other actors in the system suffer. For example, a strike by independent truckers to protest the cost and scarcity of oil affected many other industries and the consumer. Meat packing plants had to shut down; food supplies on supermarket shelves dwindled. Such breakdowns of the marketing and distribution process emphasize its importance as the lifeblood of the economy. An understanding of this essential process provides a framework for student exploration of specific industries and occupations.

The sequence of activities in this unit moves from basic information about concepts which underlie marketing and distribution, to a simple paper and pencil exercise about channels of distribution, to the tracing of the movement of a product from producer to consumer, and, finally, to the actual generation of a distribution system in a dynamic simulation. This culminating activity of the unit illustrates the functions of the marketing and distribution process in our economy. The simulation poses a problem which students must solve: to create a system to bring goods from the producer to the consumer. To do so, each student must develop and perform a function in the game which serves his need to earn a living and another individual's need to move goods to the consumer. Implicit in the process is the self-interest of the producer (and all other actors) that the goods be consumed. Without demand for the product, the producer's functions, and those of others in turn, cease to exist.

CONCEPTS

- Marketing and distribution occupations are uniquely defined by their role in the economy. They are those occupations concerned with bringing goods and services from producers to the final consumers. The marketing and distribution occupations all contribute to this flow.
- Marketing and distribution occupations facilitate the distribution of goods from many different manufacturers to many different final consumers. They may sell products directly–for example, industrial, wholesale and retail selling–or they may service the selling occupations–such as finance, advertising or market research– or they may provide a service directly to the consumer–such as lodging facilities and real estate services. In one way or another, all of the marketing and distribution occupations are concerned with filling the distribution "pipeline" between the producer and the consumer.
- The distribution of goods from producer to consumer involves the process of physical distribution along some steps of the distribution chain–from producer to wholesaler to retail store to consumer.
- At each of the steps in the distribution process there occurs another activity, namely, an *exchange* between the buyer and the seller.
- This process of exchange is central to marketing and distribution.
- The most basic kind of exchange is the exchange of goods for goods or services, or both, such as the farmer exchanging some of his crops for the services of a blacksmith.
- As societies become more complex, bazaars or other central marketplaces develop for individuals to bring their goods to sell to others and to purchase goods from others.
- Another step in the development of distribution systems is the introduction of a middleman between the buyer and the seller. This middleman

buys from many producers and sells to many buyers. His function is only to facilitate the distribution of goods and, in this sense, he is the first worker whose occupation may be defined as marketing and distribution.

- In our modern system of trade or exchange, producers and consumers do not know or meet each other. Money is a uniform system of valuing goods and services and assists trade in an impersonal system.
- Since producers and consumers do not necessarily even live near each other, goods must be moved from producer to consumer and made available to the consumer in his neighborhood. Goods are distributed through several series of middlemen until they reach the ultimate consumer. These middlemen include salespeople, wholesalers and jobbers, warehouse operators, transportation specialists, and retailers.
- In a complex economic system there are also roles and occupations which do not participate directly in the distribution process, but facilitate it indirectly. These roles include that of the banker, the advertising specialist, retail credit organizations (credit card companies, for example), retail store planning specialists, traffic managers and transportation analysts, and so forth. These marketing and distribution services have become increasingly important as improved technology, higher standards of living, and a growing population have required the creation of a more complex and diversified marketing and distribution system.
- In economic exchanges, each individual is dependent upon others for his needs and wants. In our complex society, the failure of any major group to perform its function slows or halts the entire economic system. This concept is called *interdependence*.
- Producers and consumers are dependent upon each other. A producer cannot sell his goods if a consumer does not want them. A consumer cannot satisfy his needs if a producer fails, for whatever reason, to produce.
- The individuals who move goods from producer to consumer are equally part of this interdependent system. If they fail to perform their functions, goods and services do not reach the consumer.

ACTIVITY A. *Overview of The Marketing and Distribution Process*

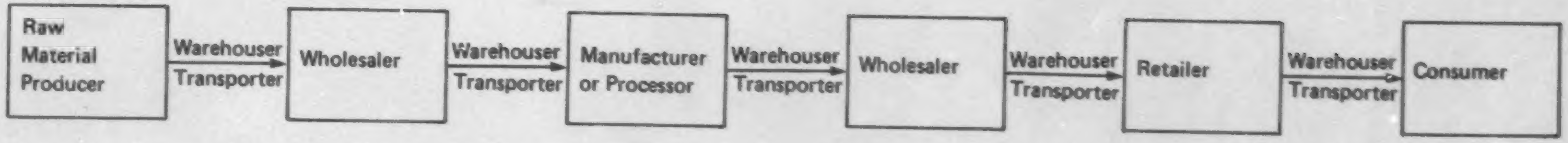
Introducing the Activity

1. Introduce students to the basic ideas and concepts about the role of marketing and distribution in the economy.
2. To introduce students to the process by which goods are moved from the producer to the consumer, and how both are served by the marketing process, the attached flow chart can be used. In simple form, it depicts the types of activities which usually play some role in the movement of goods. In discussing this flow chart, it should be made clear that these steps as illustrated are not rigid or universally applicable. That is, if there is no reason to store the goods after they are shipped to the central markets, it is not done. On the other hand, there may be a need to store the goods once they have been processed into a finished product. This illustrates the fact that storage is a service, as transportation is a service, which is utilized when a need exists. Because of the different needs which arise for different products, the flow of services varies. In describing the flow chart, it should be emphasized that the objective of everyone involved is two-fold: 1) to deliver a finished product to the consumer; and 2) to perform a function which will be rewarded in monetary terms.
3. Note also that there are many other occupations that do not participate directly in an exchange of ownership of goods but that provide services to help exchanges take place smoothly. These are found in banking, advertising, credit card companies, and so forth.
4. Emphasize the concept of exchange.

Guiding the Activity

5. Distribute the Information Sheet to the class.
6. Ask them to read it. Answer any questions that may arise.
7. Then, give each student unequal numbers of goods in the form of cards, e.g., bread, meat, vegetables, candy, fruit, shoes, socks, coat, hat, gloves, jewelry, etc. For example, one student may have 5 pairs of shoes; another may have 6 loaves of bread.
8. Instruct students to exchange goods so that they have enough goods and clothing to be well-fed and warmly clothed.
9. Suggest that the 'winner' of this game will be the student who is well-fed and warmly clothed first.

THE ROLE OF MARKETING AND DISTRIBUTION IN THE ECONOMY


Raw Material Producer
Warehouser
Transporter
Wholesaler
Warehouser
Transporter
Manufacturer or Processor
Warehouser
Transporter
Wholesaler
Warehouser
Transporter
Retailer
Warehouser
Transporter
Consumer

10. The game should take only 15-20 minutes.

11. The students have no written materials for this game.

Learning More From the Activity

1. Discuss with students the exchanges they made: how many cards of which items they traded for how many of the other items. Compare differences from student to student. Discuss why one student may have traded one pair of shoes for two food items; another may have traded one pair of shoes for one pair of socks.

2. Observe whether students traded more of what they had for fewer items toward the end of the game. As they needed a few more items to fulfill the need for food and clothing, those items may have become more urgently important to them. (In effect, the 'price' of those items might go up in response to the increased desirability.)

3. Discuss with students examples of how they have bartered with their friends (e.g. trading baseball cards; trading clothing, etc.).

4. Ask students how many of them have exchanged their services for money (e.g. babysitting; help with household chores for an allowance; etc.).

Points to Stress

- Exchange is the basic transaction which occurs at each step in the marketing and distribution process.
- Barter, exchange of goods and services, represents a simple form of exchange.
- In our complex society, each individual does not have to produce everything she/he needs (food, clothing, shelter, etc.). Each exchanges something of value (money) for goods and services produced by others.

ACTIVITY B. *Channels of Distribution*

Introducing the Activity

1. Explain to the students that this activity focuses on channels of distribution.

2. Define:

Producer: grows the raw material, like wheat, or takes it out of the ground, like oil.

Processor or manufacturer: makes the raw material into a product.

Transporter: moves the raw material or the product from one place to another.

Wholesaler: buys from the manufacturer and sells to the retailer.

Retailer: sells directly to the consumer.

Broker: assists in the transfer from one institution to the next.

Guiding the Activity

3. Distribute the Information Sheet for students to read. Answer any questions.

4. Distribute the exercise *Channels of Distribution* for students to complete

Learning More From the Activity

1. **Teacher's Key to Exercise**

I. Business which Performs Function		II. Name of Function
Oil Industry		A. Wholesaler
1. Shipping Company	*C*	B. Producer
2. Oil well operator	*B*	C. Transporter
3. Tank Truck	*C*	D. Retailer
4. Gas Station	*D*	E. Processor
5. Refinery	*E*	
Bread Industry		
1. Grocery store	*D*	
2. Railroad	*C*	
3. Wheat farmer	*B*	
4. Trucking Company	*C*	
5. Baker	*E*	
6. Grain Dealer	*A*	

2. The numbers of the businesses in order of the distribution sequence for the oil industry are 2, 5, 1, 3, 4.

3. The numbers of the businesses in order of the distribution sequence for the bread industry are: 3, 2, 6, 4 or 2, 5, 1.

ACTIVITY C. *I'll Buy It*

Introducing the Activity

1. Explain to the class that they now have an opportunity to animate the process of marketing and distribution.

2. Review definitions of terms (producers, processors, transporters, warehousers, wholesalers, retailers, value-added) if necessary.

3. In this exercise students will "walk through" a distribution chain in preparation for creating their own in the simulation activity which follows.

4. There are no student materials for this activity.

Guiding the Activity

5. Divide the class into seven groups representing:

   Producers
   Processors
   Transporters
   Warehousers
   Wholesalers
   Retailers
   Consumers

   Seat group members together.

6. Explain that the object of the exercise is to turn the raw material into a finished product and get it to the consumers.

7. Give a Product Card to the *Producers* and state that it represents a raw material for which they paid $100. They must decide:

   - which team to sell it to
   - a way to get it to them
   - the price they are asking for the goods
   - the price they will pay for a needed service, e.g. transportation

8. Each team announces its decision to the class. Monitor their responses and disallow incorrect ones. For example, if producers want to sell directly to retailers or consumers, remind them the raw material has not yet been turned into a finished product.

9. Have a team representative visit the next team to discuss a deal. You may permit teams to negotiate price or not (i.e. require the next team to accept the price).

10. When an acceptable, correct plan is announced, have the *Transporters* physically move the Card from one team to the next.

11. The next team, the *Processors*, then acts. The *Processors* must decide:

    - which team to sell their finished product to
    - what price to charge
    - how to get the goods to the next buyer
    - what price to pay for a needed service

12. For *Warehousers* to have a real function in the exercise, at this point, you must tell the students that the finished product takes up more physical space than the raw material. The *Transporters* cannot deliver all the finished product at once. They must make two or three trips. The goods, therefore, must be stored in the meanwhile.

    To represent this situation clearly, it is advisable to add one or two additional Finished Product Cards so that the goods are physically represented for the Processors, Transporters, and Warehousers.

13. Continue through *Wholesaler, Retailer*, and *Consumer* functions. Each team must decide:

    - which team to sell the product to
    - what price they are asking
    - how to get the goods to the next buyer
    - what price to pay for a needed service

14. This exercise ends when the *Consumer* has the goods.

Learning More From the Activity

1. After the activity, trace with the class:

   - the number of times the goods were handled
   - the order of teams which handled them
   - the price between producer and consumer (emphasize value-added here)

2. Ask students what would have happened if there were no transporters in the exercise. No retailers? Emphasize interdependence.

Points to Stress

- The functions and roles in the marketing and distribution process are highly interdependent. Each step in the process is determined by those preceding it and those which follow.
- Each time a product is handled, value is added to it.

ACTIVITY D. *Simulation*

Preparing for the Activity

- The simulation requires advance planning and preparation. This section is included to assist you.
- The simulation takes 3-5 class periods, including:
  - introduction and student preparation of displays (1-2 periods)
  - the simulation itself (1-3 periods)
  - the post-play discussion (1 period)
- Examine the packet of student materials, including role cards and play money, and how they are to be distributed. Suggestions for classroom layout for the simulation are included.
- Prepare the materials as directed. Also, plan to

make art supplies available to students to prepare signs, displays, etc., to represent their businesses in the simulation.

- Students will learn how goods flow from the producer to consumer by performing the functions and roles which accomplish this flow, and they will learn how the price of goods and services is negotiated.
- The *object* of the simulation is for students, who start with a raw material, to deliver a finished product to the consumer. To accomplish this goal, students play the roles of producers, transporters, retailers, or any other role necessary to process and distribute the goods. The hypothetical product in the game is oil.
- The *objective* of each player is to earn money.
- Students have freedom to select the roles they prefer. There are no pre-assigned roles which must be selected.
- The basic activity of the simulation involves the negotiations of players to buy and sell goods or services to each other.
- This has two implications for classroom activity:
  - students need to be able to circulate freely to negotiate with other students; and
  - the classroom is not quiet.

Accept these as natural features of the simulation activity.

Teacher's Overview: Game Action

Student Instructions	**Teacher's Notes**
1. Select a Role Read the attached *List of Roles.* On the list you will find the names of the roles, the facilities and equipment which you must purchase to play those roles, and the costs of each. Decide which role you want to play.	1. *The game begins with student selection of roles. Students review the available roles listed and the price of equipment and facilities associated with each (e.g., trucks for transporter, $100 each). Students may not select more than one role or function initially but they may buy more than one piece of equipment or facility if they have the money. Later they may diversify–i.e. buy other types of facilities and equipment (except land).*
2. *Advertise* Prepare a sign to identify your business. Make a symbol if you like.	2. *Make art supplies available for students.*
3. *Purchase your Resources* When you have decided what you want to be and how much you want to buy with your stake of $600: • Go to the Bank. • Tell the Banker the role you have chosen. • Pay the Banker for the equipment you want. • Collect your Role Card from the Banker.	3. *Students then actually purchase the equipment needed to play their roles. They accomplish this by visiting the banker (a student role described below) to pay their money and receive role cards. Give each student $600 to start the game.* **Role cards** *are worn by students to identify their roles to other players in the game.* **They** *summarise for each player what each role involves, specifically what the player buys and sells and to whom, and what facilities and equipment each has.*
For Producers: If you choose to be a producer, you must buy both land and at least one oil well. You may buy land only at the beginning of the game because land will not be available for sale after that. The Bank will lend $1000 to any player who wants to be a producer in order that he/she may buy land. Each producer will start the gamer with one Product Card.	*Any student who wishes to be a producer* **must** *purchase both* **land and an oil well.** *Land may be purchased only during the initial purchase step.* *Students who wish to purchase land and an oil well may borrow money from the bank since their investment is viewed by the bank as a "safe" one.*

4. *Start to do Business*

Now that you have chosen your role and bought your equipment from the Bank, you are ready to begin buying and selling goods or services to other players. For example, if you are a Transporter, you will want to sell your trucking services to someone who needs oil transported. Or, if you are a Producer, you will want to sell your Product Card, representing crude oil, to someone who can refine it. Producers and refiners may not sell directly to retailers.

Find the players you wish to do business with, make your deals, agree upon a price and pay cash.

5. *Where is the Oil?*

The Product Card:

This card represents the oil that you are buying or selling. Whoever has a Product Card in his/her possession at any given moment has possession of the oil.

The Producer(s) is the only player at the beginning of the game who has a Product Card. Each player who handles the Product Card must sign it at the appropriate symbol.

6. *Expand your Business*

If you have the money, you may expand your business in the game by going to the Bank to purchase more equipment.

But remember that land will not be sold after the first trip to the bank at the beginning of the game.

4. *At this point, each player in the simulation will be seeking to make an exchange of goods or services with another player. Students interact freely, locating the particular role they need and negotiating prices for the product and services. Note that producers and refiners may not sell directly to retailers.*

Each transaction is associated with the exchange of money and other paper. Money is paid by the buyer of goods or services to the seller in an amount mutually agreed upon. It is paid as soon as the deal is made (cash in advance). In addition, the Product Card is passed on.

5. **Product cards** *represent the oil. Initially each producer receives on Product Card when he purchases the land and an oil well. When he sells or moves the oil, he actually passes the card on as well. Thus, at any moment in the game, the physical location of the product can readily be identified. A Product Card may be obtained from the Bank* **at no cost** *by each producer as often as he* **sells** *or* **stores** *a Product Card. The production capacity (one Product Card) of the oil well is determined by its storage capacity. The oil well counts as a storage facility with a capacity for one card. As soon as that card is moved out of the oil well, another may be obtained. No additional investment is required for obtaining additional Product Cards because the investment for the oil well is considered sufficient to cover all costs of extraction. Note that additional oil wells may be purchased, however, and that* **each** *oil well has capacity for one Product Card.*

As marketing and distribution channels are established in the game, you may expect students to move oil out at an increasingly rapid rate, and producers will return to the Bank to pick up Product Cards with increasing frequency

The Product Card also provides a recordkeeping function. Each student who performs a function on the card signs it at the symbol representing what he/she did to it (e.g., transporter signs at the truck).

6. *Should the game continue long enough (i.e., production volume increases beyond capacity), students may wish to expand their capacities by purchasing additional resources. This may be accomplished at any point in the game by visiting the Banker and paying for the additional resource. The one exception to this is land. It may be purchased only at the outset of the game although additional oil wells may be bought at any time.*

7. *Capacities*

   You will note that all resources have a Capacity figure. This is either 1 or 2 Product Cards. You may handle only the number of Product Cards per facility indicated by that number.

   For example, for each warehouse you have, you may store 2 Product Cards. For each truck you have, you may transport 1 Product Card. For each plant you have, you may produce or process one Product Card at a time. But you may buy storage space for Products Cards in a Warehouse at any time. By storing your Product Cards in a warehouse, you may expand your capacity to do business.

8. *Recordkeeping*

   You are encouraged to maintain a record of your business. Use the Record Form.

   For each transaction, simply fill in the price you paid or received under the column indicating what you did, (bought, sold, stored, shipped). Do this after each transaction.

9. *Consumer*

   The Bank is the consumer. Retailers sell gasoline to the Bank.

7. *Each resource has a capacity associated with it. This number indicates how many Product Cards a player can handle for each resource he buys. Thus a truck can transport only one Product Card at a time. A warehouse can store two Product Cards at a time.*

8. **Record Forms.** *Each student keeps a record sheet of all his transactions. Students will then have a means of keeping track of their actions throughout the game and also a summary of their activities and finances at the end of the game.*

9. *The price the consumer (bank) pays for gasoline is a percentage of what the retailer paid. Bankers are instructed to pay retailers at the following rates:*

   - *First 8 Product cards double*
   - *Next 3 Product cards 50% more*
   - *Next 3 Product Cards 10% more*
   - *Next 3 Product Cards 100% more again*
   - *After that, bankers will ask you.*

   Adjust this schedule depending upon the pace of the game. Low prices slow it down; high prices speed it up.

Introducing the Activity

1. Be sure the materials needed are ready.
2. In the first day or two, plan to:
   - review the rules with students
   - have students choose roles
   - have students prepare the setting by making signs, hats, etc., to represent their businesses in the game.
3. Point out to students that the simulation builds upon the walk-through exercise in Activity C. In the simulation, students will have a similar challenge—to deliver a finished product to the consumer, beginning with a raw material. Unlike the previous activity, in the simulation they will select their own roles, find others whose goods or services they need, and work out a price. The raw material in the game is oil.
4. If necessary, review definitions of terms (e.g., producer, retailer, etc.).
5. Use the Student Instructions to review the object of the simulation, the objectives of each player, and the actions or steps each will take.
6. Emphasize for students that they will have the chance to create their own system to achieve the goal of producing a product for sale to the consumer. They should not be tied to any particular system; they need only focus on accomplishing the aims of the game.
7. Tell students that the winner of the game is determined in two ways.

a) The student with the most *profit* may be considered the winner.

b) The student with the highest *return on investment* may be considered the winner.

Students learn the different meanings of these two calculations.

8. *Overview*: Give students an overview of the basic actions they will perform:

   a) They will select a role to play from a list of roles and prices.

   b) Each role requires buying or selling goods or services to other businesses in the game. Each player will find an appropriate buyer or seller for the goods or services he/she needs to sell or buy.

   c) They will negotiate a price for selling a product or service and will pay for it then.

   d) They will exchange money then, sign the Product Card and transfer it.

   e) They will fill in a Record Form.

   f) They will repeat the steps, continuing to buy and and sell products and/or services each time they are ready to do so (e.g., when they have sold their last one).

9. *Special Rules*: Emphasize the *special rules* which apply in the game.

   a) *Transportation*: Product must be transported from any seller to any buyer and from any owner to any storage facility.

   b) *Producer Role*: Student who wishes to be a Producer must buy land and an oil well together. Producer roles may be selected *only* at the beginning of the game and not thereafter. Land will not be sold after that although additional oil wells may be bought later by a Producer who already has land. Students who wish to be producers may expect to obtain a loan from the bank to help them purchase Land. The bank will lend money *only* to Producers.

   c) *Product Cards*: Product Cards may be obtained from the bank by Producers whenever a Producer has sold or stored his last one. HE DOES NOT NEED TO PAY ANY MONEY FOR THESE CARDS. HE SIMPLY SHOWS HE HAS SOLD OR STORED HIS PREVIOUS ONE. Producers may get as many Product Cards for free from the bank as they have room for, i.e., in each oil well and storage tank.

   d) *Capacities*: Product capacities must be monitored. So long as one Product Card is held at an oil well or refinery, there is no room available for additional Product Cards. Thus, a producer or refiner may never hold more than one Product Card per oil well or refinery. Other players must also pay attention to the number of Product Cards they may have per truck, warehouse, gas station, and wholesale facility.

   e) *Expanding Business*: Students may purchase additional facilities and equipment at any time during the game, except that Producers may not purchase more land.

   f) *Consumer*: The Banker plays Consumer in the game and will buy all Finished Products from Retailers.

10. Do not expect students to learn all the rules before the action begins. Answer questions but point out to students that these rules will become more familiar as they begin.

Guiding the Activity

11. *Setting up the Game*

    a. Establish one location for the Bank. Product Cards, Role Cards and money are kept here.

    b. Assign two students to act as bankers. Give them each a copy of the Banker's Instructions. Give them Bank Forms #1 and #2. Have the bankers divide the labor.

    Selling Equipment: one banker should keep records on Bank Form #1; one banker should collect money and distribute Role Cards, including Product Cards.

    Purchasing Gasoline: one banker should keep records on Bank Form #2; one banker should pay out money.

12. *Starting the Game*

    a. To begin the game, it is useful to guide one student through the first steps as a demonstration.

    b. Select a volunteer who knows what role he/she wants. Have him/her purchase the Role Card from the Bank. Then, have him/her identify the business he/she would like to find first and what he/she wishes to buy or sell from that business. Then ask for a student who wishes to play *that* role to purchase his/her Role Card from the Bank.

c. Have the two students negotiate in front of the whole class. Supervise the exchange of money and paper and recordkeeping.

d. Have all students think about what roles they wish to play. Permit students time to prepare signs and displays to identify their business.

e. Then distribute play money to each student in the class, as indicated in the packet.

f. Encourage all students to visit the Banker, purchase their cards, and proceed to negotiate.

g. Permit students to begin as soon as they have completed their purchases at the Bank. They do not have to wait for all students to purchase their role cards and facilities.

13. *Monitoring the Game: Possible Events*

Circulate freely during game play. Encourage students to move around the room and talk freely to whomever they wish. Assist students who don't know exactly what to do, and try to eliminate any traffic jams.

You cannot know in advance every possible circumstance which may arise. The game is truly open-ended. However, some possible situations which may require intervention are discussed below.

- *Slow Action*: Expect the game to begin slowly. Not only do students need to find their way in the game but also the movement of the first Product Card through a developing system will take time. The pace of the game will pick up. By all means, assist students who need help.

- *Questions about Rules*: Especially in the early stages of the game, students are likely to have questions about the rules and/or the use of forms and recordkeeping sheets. Try to answer the specific questions rather than reiterate all the rules. Students need to learn one step at a time in a game. It is more important that they act, then figure out their next step, than that they attempt to figure out all steps in advance.

  Use the student materials, particularly their instructions and the Facilities List, for a summary of rules, prices, capacities.

- *Deadlock*: It is possible the game will deadlock–come to a grinding halt–if the students have selected certain combinations of roles. If, for example, few students have chosen transporter roles, players will not be able to move goods through the system. If no retailers exist in the game, goods cannot reach the consumer. Permit the game to run for at least 30 minutes before determining whether deadlock has occurred. It will take approximately that amount of time for you to be sure of how students are doing. Initial slow action might otherwise be mistaken for deadlock.

- *Special Conditions*: Monitor those actions and transactions which relate to the special rules of the game. For example: producers may not remember they don't have to pay for additional Product Cards.

  They may forget that they may not have more than one Product Card at an oil well at a time. Many of the Special Rules will involve the Bankers as well since they give out Product Cards, etc. Monitor the Bankers to be sure they are observing these rules.

- *Recordkeeping*: Although recordkeeping slows down the game, it is worthwhile to remind students this is an important function. It not only reduces confusion by helping students keep track of what they're doing, but it will be a useful learning tool, particularly in the discussions which follow the game. You can simplify recordkeeping by having each player prepare a distinctive symbol with business name to attach to the Product Card. This way a player could put "his mark" on the product as it passes through his/her hands.

- *Retail Prices*: Retail prices for gasoline are a percentage of whatever the retailer paid. Bankers are instructed to pay retailers at the following rates.

First 8 Product Cards	double what the retailer paid
Next 3 Product Cards	50% more than the retailer paid
Next 3 Product Cards	10% more than the retailer paid
Next 3 Product Cards	double again
Next Product Cards	Ask the teacher what rates to pay.

  As the "consumer" market declines, note the lowering of prices throughout the game. Have students discuss what happened at the end of the game. You may wish to alter the rates above depending upon the pace of the game.

Learning More From the Activity

1. *Scoring the Game*

It is usually fun and also instructive to score a game and determine a winner(s). This is also a useful lead into beginning the discussion of the game by focusing on those actions students took in the game which resulted in their final positions.

An overall winner of the game should be determined.

A winner for each type of role (e.g., wholesalers) may also be identified.

Scoring is calculated in 2 ways.

a) How much profit player earned. The winner in this calculation is the player who earned the most money after expenses.

b) How much each player *earned* in relation to how much money she/he *invested*.

The winner in this calculation is the player who earned the highest "return on investment." This is generally expressed as a percentage figure representing a rate of earning. For example, if a person has invested $100, and earns back $20, his return on investment is 20%.

2. *Synthesizing the Action*

Point out to students that no one player in the game know what everyone else did. To stimulate discussion after the simulation is over, focus on *what* students *did before* discussing *why*, and before comparing the simulation experience to real-world processes.

Begin by asking players who selected the same roles in the game to explain what they did. Try to get them to account for the difference in their scores.

- Why did they choose the role?
- With whom did they negotiate and do business?
- What prices did they buy/sell at?
- How did prices change in the course of the game? What was the trend, if any?
- What problems did they encounter? (not enough trucks available, too few Product Cards in the system, etc.)

Use the Product Cards as records of the action to refresh students on what they did.

Identify the marketing and distribution roles in the simulation as distinct from the production roles.

3. *What About a Re-Play?*

Ask students to explain what they would do differently if they were to play the game again, or what advice they would give a friend who was about to play the game.

This question begins to get students to analyze good strategies for playing. Point out to students, however, that the effectiveness of their actions would depend in part on the actions of all other players. For example, if everyone rushed to select Producer roles a second time around, the simulation would not operate at all.

Have students compare their marketing and distribution system in the simulation to real-world functions and channels.

4. *What If?*

Ask students to predict the consequences of the breakdown of parts of the system, such as:

- truckers go on strike
- oil wells dry up
- warehouse workers strike
- refineries are destroyed by fire
- retailers are boycotted by consumers

Points to Stress

- Emphasize the interdependence of functions in the simulation and in the economy. Point out that if numerous students opted for roles as retailers relative to other roles in the game, an insufficient number of goods would reach them for sale to the consumer. In effect, some of them would go bankrupt. If numerous students opted for producer roles, large numbers of goods would be produced with not enough transporters to transport them and distribute them to the consumer.
- Emphasize the concept of *value-added* by asking students to trace the prices on PRODUCT CARDS as they passed from one player to another. Most likely each transaction on a card was at a higher price than the previous one.

RESOURCES AND REFERENCES

"Business Week." Weekly magazine. Marketing Section. "Marketing Observer" column reports on current developments in marketing.

Klaurens, Mary K. *The Economics of Marketing*. New York: McGraw-Hill, 1971. Text-Workbook examines economic concepts of Marketing.

Mason, Ralph and Rath, Patricia M. *Marketing and Distribution*. New York: McGraw-Hill, 1968. High School Distributive Education text designed to provide understanding of economic and marketing concepts. Job opportunities are discussed along with marketing concepts.

Nolan, Carroll and Warmke, Nolan. *Marketing, Sales Promotion and Advertising*. Seventh Edition. Cincinnati: South-Western Publishing Co. Text for high school distributive education classes helps develop a basic understanding of marketing and distribution.

SCORING

To calculate scores, each student should fill in the following:

1. Amount of capital (cash and loan for producer)
you started with

Stake = $600

2. Amount of money invested
Add the price of all resources you purchased
in the game 2 trucks @ $100 = $200
1 warehouse @ $200 = $200

Total Scoring Base = $400

3. Uninvested Money
Subtract 2 from 1

1. – 2. Uninvested capital = $200

4. Set aside 3.
from cash in hand

* Count cash in hand after
uninvested money is set aside

Earnings = $300 or Profit

** Calculate ratio of 5. to 2.
(earnings to invested capital)

$$\frac{300}{400} = \frac{x}{100}$$

Rate of return = 75%

* Calculate winner with most
profit.

** Calculate winner with highest
return on investment.

Winner for each role (e.g. Producer with highest score) may also be identified.

UNIT 7: OVERVIEW OF THE FIELD OF MARKETING AND DISTRIBUTION

Teacher's Guide

OVERVIEW

ACTIVITIES	MATERIALS
A. *What is Marketing and Distribution About?* Students learn the industries, functions and operations which comprise the field of Marketing and Distribution.	Student Information Sheet and Cluster Diagrams and Guide for each student.
B. *A Look at Marketing and Distribution Occupations* Students identify characteristics of occupations in the field of Marketing and Distribution.	Three matching exercises for each student.
C. *Who is the Consumer?* Students identify the consumer that a variety of Marketing and Distribution businesses serve.	One matching exercise for each student.
D. *If You're in a Hurry* Students identify specific different businesses which meet different consumers' needs and preferences.	One matching exercise for each student.
E. *We've Got One Right Here in Town.* Students prepare a guide for non-residents to the Marketing and Distribution businesses in the local community, based on a "walking tour" and/or use of directories.	Instructions and "Taking Notes" Information Form for each student; Yellow Pages; newspapers.

OBJECTIVES

- Students will be able to define "marketing" and "distribution."
- Students will be able to identify marketing and distribution industries, employers and occupations.
- Students will be able to match marketing and distribution occupations with employers and the marketing functions they accomplish.
- Students will be able to define marketing and distribution channels and functions.
- Students will be able to identify local marketing and distribution businesses.

RATIONALE

Over one-third of the work force of the United States is employed in marketing and distribution occupations. Probably one out of every five students in any class will be employed in a marketing and distribution occupation upon graduation from school. Exploration of a field which represents such major career opportunities and growing employment opportunities is therefore essential.

The field of Marketing and Distribution is both diverse and complex. This is because every business markets its products and/or services and therefore, marketing and distribution occupations are found in all industries and all employers. Even non-business organizations, such as fund-raising charities, employ techniques of marketing and distribution.

For this reason, a comprehensive understanding of Marketing and Distribution requires that students investigate the field from a number of different perspectives. No one line of inquiry supplies a complete enough description to assist students in career decision-making.

To gain an overview of the field, students therefore examine occupations from the vantage points of:

- the industries in which they are found
- the marketing and distribution functions performed

This approach is necessary for two reasons. First, each industry has special characteristics, (among them, its products or services) which must be understood both for effective career decision-making and for effective job performance. Second, since not every occupation within an industry is regarded as a marketing and distribution occupation, (e.g., a typist in a department store is not), defining marketing and distribution occupations requires the delineation of marketing and distribution functions.

These principles represent the basic scheme upon which the cluster diagram was constructed. The cluster diagram is simply a device for organizing, in a manageable fashion, the diverse occupations, functions and industries in the field. To assist students' exploration, industries are grouped according to the basic consumer needs they serve. For example, those industries providing financial and business services are grouped into one subcluster to facilitate student exploration.

The cluster should provide students with an overview of the industries and occupations which comprise marketing and distribution. It is not intended to be a comprehensive listing of all marketing and distribution occupations. Rather it enumerates examples of marketing and distribution occupations as a starting point for students to become familiar with the field.

Subsequent to the study of the cluster and the marketing functions, students reinforce their previous learning through several activities which are designed to relate marketing and distribution occupations to industries; and tasks and responsibilities to occupations.

Students then relate marketing and distribution business to consumer needs. To demonstrate that marketing and distribution occupations and functions are pervasive, and consistent with "hands-on" and "eye-witness" strategies suitable to adolescent development, students explore their own community and develop a guide to local marketing and distribution businesses for a consumer audience. The guide should emphasize the different types of services businesses provide.

CONCEPTS

- Marketing and Distribution is a field that employs a large number of people. Marketing and Distribution involves all those business activities that direct the flow of goods and services from producers to consumers.
- Everything we purchase brings us into contact with marketing and distribution businesses and occupations, many of which are therefore familiar to all of us.
- The Marketing and Distribution cluster can be divided into six subclusters of related industries.
    1. The Business and Financial Services subcluster includes those occupations concerned with providing financial and business services.

2. The Food Distribution subcluster includes those occupations concerned with the marketing of food.
3. The Services for Personal Needs subcluster is concerned with marketing services which meet the personal needs of the consumer.
4. The Transportation Services subcluster includes those occupations involved in the marketing of transportation services, equipment and fuel.
5. The Property and Home-Related Items subcluster includes those occupations concerned with the marketing of property and home-related items.
6. The Apparel and General Merchandise subcluster includes those occupations involved in the marketing of clothing and general merchandise items.

- Marketing and Distribution consists of five functions: Selling, Buying, Sales Promotion, Marketing Research and Management.
  1. Selling is concerned with assisting the customer to make a purchase.
  2. Buying is concerned with securing merchandise for resale or for use in making goods or providing services.
  3. Sales Promotion is concerned with services which support the sale of goods and services, such as display or advertising.
  4. Market Research is concerned with providing the information on which to base marketing decisions (e.g., consumer preferences).
  5. Management involves the organization of people and resources to accomplish a marketing purpose.
- Marketing and Distribution occupations are defined by the industry and the marketing function. For example, an individual might be employed as an apparel buyer in the fashion industry or a car salesperson in the automobile industry.
- Consumers of products and services can be both individuals and other businesses.
- Meeting consumer needs is the overall purpose of marketing and distribution activities.
- At different times, the same consumer may have different needs with respect to a particular product or service (e.g., fast food vs. luxury restaurant).

ACTIVITY A. ***What is Marketing and Distribution About?***

Introducing the Activity

1. Explain to students that during this activity they will study the field of Marketing and Distribution.
2. Explain that Marketing and Distribution involves all of those business activities that direct the flow of goods and services from the manufacturer to the consumer. The term *manufacturer* is used interchangeably with *producer* and refers to the person who makes the goods. *Consumers* include both individuals and businesses who purchase goods and services.
3. Marketing activities or functions include selling, buying, sales promotion, marketing research and management.
4. Marketing and Distribution involves retail stores, wholesalers, service enterprises, and brokers (who arrange sale from the manufacturer to the wholesaler or retailer) and the marketing activities of manufacturers.

Guiding the Activity

5. Distribute the Student Information Sheet on *The Field of Marketing and Distribution: Functions and Industries*. Review the information with students. Ask students to name additional occupations within each function.
6. Distribute the **Cluster Diagram Guide** and the **Marketing and Distribution Cluster Diagram** to the students.
7. Allow students some time to examine the diagrams. The diagrams contain only examples of marketing and distribution occupations. Emphasize how widespread and diverse the occupations are.

Learning More From the Activity

1. Using the cluster diagrams, ask students to identify marketing and distribution occupations by industry and function, e.g., hardware buying position: a hardware buyer.
2. Ask students to describe marketing and distribution businesses and occupations they are familiar with.
3. Ask students to name occupations that sound interesting though unfamiliar to them.
4. Ask students to identify occupations in the diagram which are held by people they know.

Points to Stress

- Marketing and Distribution is a diverse field that concerns every product and service we use.

- Marketing and distribution activities direct the flow of goods and services from producers to consumers.
- All industries and all businesses engage in marketing activities. However, not all occupations found in each industry and business are considered marketing and distribution occupations. These are limited to occupations which are involved in the marketing and distribution of goods and services.

ACTIVITY B. *A Look at Marketing and Distribution Occupations*

Introducing The Activity

1. Explain to students that they have had an opportunity to become familiar with components of marketing and distribution. Now, students will be looking further at marketing and distribution occupations and the responsibilities they involve in a series of matching exercises.
   - **IS THAT WHERE THEY WORK?**

     Students match occupations and industries.
   - **SO THAT'S WHAT THEY DO!!**

     Students match job responsibilities and occupational titles.
   - **WHO SAID THAT?**

     Students match comments with marketing and distribution occupations.

Guiding the Activity

2. Distribute the three matching exercises to students. Allow approximately twenty minutes to complete.
3. Review answers with students.

Answers

Is That Where They Work?		So That's What They Do!!		Who Said That?	
1.	I,C	A.	9	A.	4
2.	K	B.	6	B.	5
3.	H	C.	3	C.	6
4.	I	D.	2	D.	7
5.	A	E.	4	E.	8
6.	D	F.	5	F.	1
7.	E	G.	8	G.	2
8.	F	H.	10	H.	3
9.	G	I.	1	I.	10
10.	J	J.	7	J.	9
11.	B				
12.	L				

Learning More From the Activity

1. Have students list responsibilities of other marketing and distribution occupations they are familiar with.
2. Have some students write or call out typical comments and have other students match up with occupations.
3. You may wish to develop additional similar activities. Consider scrambling titles of occupations, or have students fill in blanks from clues about occupations, if your students enjoy word games.

Points to Stress

- Marketing and distribution occupations require knowledge of products and services such as clothing, and competency in marketing functions (sales, buying, market research, management, sales promotion).
- Both types of knowledge and skill are necessary for effective job performance.

ACTIVITY C. Who is the Consumer?

Introducing the Activity

1. Explain to students that marketing and distribution businesses serve the needs of consumers.
2. Explain that consumers include a person needing TV dinners to prepare a "quick meal" and a business that needs to purchase automated equipment to do the company payroll.
3. Explain to students, that in this activity, they will identify the consumers for various products and services.

Guiding the Activity

4. Distribute matching exercise entitled, *Who is the Consumer?* to the students.
5. Allow approximately ten minutes to complete.

Learning More from the Activity

1. Review the answers with the class.

Answers to: *Who Is the Consumer?*

1. G
2. G
3. B,G
4. G
5. A
6. A,I,C,H
7. B,F,G
8. D
9. L
10. B,G
11. B,J
12. E
13. C
14. N
15. A,C,G,H,I,J,K,L,M,N
16. H,K,M

2. Reiterate to students that consumers can be individuals, organizations such as the Little League or other businesses such as an automobile dealership.

Points to Stress

- Every individual and organization is a consumer of goods and services.

ACTIVITY D. *If You're in a Hurry*

Introducing the Activity

1. Explain to students that every consumer has different preferences and needs. In fact, the same consumer usually has different needs at different times. For example, the same individual may sometimes want a quick inexpensive meal in a restaurant; at other times, he/she may wish to have a leisurely, elegant dinner. Obviously the individual would patronize two different restaurants on these different occasions.
2. Another type of consumer need/preference involves trade-offs between price and service. For example, a consumer may be willing to pay more money for a product if he/she will be assisted by a salesperson, if the merchandise is attractively and neatly displayed or if the store is conveniently located and the consumer can save time.
3. Point out that different businesses serve these different consumer needs and preferences.
4. Explain that in this activity, students will match consumer needs with the business that can best serve them.

Guiding the Activity

5. Distribute the activity to each student. Allow approximately 15 minutes to complete.

Learning More From the Activity

1. Review the answers.

Consumers	Businesses
1	D
2	G
3	E
4	F
5	H
6	A
7	C
8	H

2. Ask students to describe situations in which they would pay more for a product or service in return for convenience, speed, assistance, etc.
3. Have students expand the examples in the exercise.
4. Ask students to think about local businesses such as the ones described which have similar products/services but which serve very different consumer needs. They will investigate this further in the next activity.

Points to Stress

- The particular mix of products and services provided by a business satisfies certain consumer needs, not others.
- Each consumer has different needs and preferences at different times. Price is only one factor; service and convenience may be more important than price to some consumers at some time. This is as true for businesses as for individuals.

ACTIVITY E. *We've Got One Right Here in Town*

Introducing the Activity

1. Point out that this activity is a follow-up to the previous one in which students identified businesses which served different consumer preferences.
2. Ask the students if they know any insurance companies, stockbrokers, advertising firms in town. Explain that they may be aware of businesses such as supermarkets that they come into regular contact with but may not be aware of other kinds of businesses located in the community or nearby.
3. Ask students to imagine they are new residents or visitors to your city or town. They will have to find out about the different services available from local businesses.
4. Explain to students that they will be preparing a Guide for newcomers to your town.

Guiding the Activity

5. Have students list all the goods and services a new resident would need.
6. Include a place to live, a mover, a bank, insurance, food market, restaurants, clothing, etc. Make the list as complete as possible.
7. Using the cluster diagram, group the items to conform to the subcluster headings. Identify the industries concerned with the products and services listed.
8. Emphasize that for each of the needs listed, students will be looking for at least two businesses of different types which might satisfy each need. In this way, they could offer the consumer a choice, based on price, atmosphere, etc.

9. A really helpful guide would describe the different goods and customer services available under each product/service listed. For example, two shoe shops might differ in quality and price of shoes offered, family members served (e.g., women's shoes only), availability of credit, and so forth. Supermarkets might differ in size, prices, parking facilities, delivery, check-cashing services, variety, locations, and so forth.
10. The information students should obtain is summarized on a sheet titled "We've Got One Right Here in Town: Taking Notes." The information on each business includes: name; address; days and hours open; type of product (quality, style); special features or services (e.g. parking facilities, delivery, telephone orders); price range, examples of prices or selected items; special features; kind of place; who should use it.
11. Distribute several copies of the sheet to students and review the points with them.
12. You may wish to divide the class into teams of 3-4 students and assign some of the products and services on the list for each to investigate further.
13. If possible, arrange a field trip to the downtown and other areas of the city to study the businesses directly. If you live in a large city, choose a neighborhood of the city to make the Guide a manageable project and product. Students can explore businesses local to their own neighborhoods after school.
14. Use the Yellow Pages and newspaper ads as additional means of identifying different businesses which satisfy different consumer needs.
15. Consider having students telephone businesses they know by name only to find out what kind of services they offer (e.g. menu and prices at a restaurant). They can also ask their parents if they know about certain enterprises and what they offer.
16. Decide how to organize the Guide with student. Organizing by product or service is probably most useful. Emphasize that at least two business establishments offering different advantages and different prices under each product/service should be included.
17. When students have collected all the information they need for the Guide, have each team write up the information on the businesses and prepare illustrations. Suggest an informal style of writing.
18. Consider offering the Guide to the Chamber of Commerce, local newspaper, or local merchant's association for publication. Students might consider taking the Guide the whole route–arranging for printing and sale of the Guide in the community.

Learning More From the Activity

1. Discuss with students the different kinds of consumer preferences which might be satsified by different businesses. Consider how much choice there is for the consumer in the geographical area students explored.
2. Consider the same issue from the businessperson's point of view. What kind of consumer needs does each business in the Guide try to satisfy (e.g. low prices/no frills; sense of being catered to; no waiting; desires for convenience)?
3. Note whether any needs on the initial list cannot be satisfied in the community. Consider whether certain kinds of needs may be satisfied more easily than other (e.g. many shoe shops, few sporting goods stores).
4. Look for any patterns in the location of various types of businesses. Are higher-priced goods and services concentrated in a downtown area? Or the reverse? Are leisure activities concentrated in one area (e.g. theatres, bowling alleys)?

Points to Stress

- Marketing and distribution businesses provide basic human needs (e.g. food, shelter, clothing).
- Consumers can usually find the products and services they want at acceptable prices from some business in their community.
- Some kinds of products and services are more readily available than others (e.g. in most communities, more food markets than luxury restaurants).

Performance Criteria

Students will be able to define "Marketing and Distribution."

Students will be able to identify the six subclusters of Marketing and Distribution.

Students will be able to identify at least two employers and four occupations in each of the six subclusters.

Students will be able to name at least two businesses in their own community in each of the subclusters.

Students will be able to match six Marketing and Distribution occupations with appropriate employers.

RESOURCES AND REFERENCES

"Advertising: A Career of Action and Variety" (pamphlet). American Association of Advertising Agencies, 200 Park Avenue, N.Y., N.Y. 10017.

"Banking: A Career For Today and Tomorrow" (booklet). American Banking Association, 1120 Connecticut Ave., Washington, D.C. 20036.

Bikkie, James. *Careers in Marketing*. New York: McGraw-Hill, 1971. Student manual that assists students in exploration of marketing careers in apparel, home furnishings, automotive, food, hardware and marketing services.

Bratton, Otis L. and Tomlinson, Robert A. *Cabbages to Kings and Various Things*. Glendale, California: Bowmar, 1970. Set of filmstrip-cassettes that examines five marketing careers.

"Careers and Opportunities for You in the Fabulous World of Fabrics" (pamphlet). Textile Distributors Association, Inc., 1040 Avenue of the Americas, N.Y., N.Y. 10018. Description of job opportunities in textile industry and information on colleges for further study.

"Careers for Youth in the Food Industry" (pamphlet). National Restaurant Association, 1530 North Lake Shore Drive, Chicago, Illinois 60610.

"Careers in the Floral Industry" (pamphlet). Society of American Florists, 901 N. Washington St., Alexandria, Virginia 22314.

Career Information Unit for Distributive Education Student Handbook. Columbus, Ohio: Distributive Education Materials Laboratory, 1973. Series of student activities in each marketing cluster that enables student to explore various marketing careers. Teacher Handbook available.

"Food Retailing May Be the Career For You" (pamphlet). National Association of Retail Grocers, 360 N. Michigan Ave., Chicago, Illinois 60601. Pamphlet examines career opportunities in food retailing including sample success stories.

Johnson, George. *Your Career In Advertising*. New York: Julian Messnev, 1966. (186 pp). The owner of an advertising agency describes various kinds of job opportunities and offers suggestions for training and for getting a staff.

"Opportunities in the Trucking Industry" (booklet). American Trucking Association, Inc., 1616 P. Street, N.W., Washington, D.C. 20036. Brief outline of principal careers in trucking. . .emphasis on business careers.

"Opportunities In Retailing" (pamphlet). National Association of Retail Manufacturers, 100 West 31st St., N.Y., N.Y. Description of career opportunities in retailing.

Orent, Norman B. *Your Future in Marketing*. New York: Richards Rosen Press, 1966. View of wide scope of career opportunities and challenges in field of marketing.

Retail Automotive Business (booklet). Education Department, General Motors, Detroit, Michigan. Overview of how retail automotive business operates and information on retail automotive careers. Booklet also examines where entry level positions can lead.

Wiggs, Garland, D. (ed.) *Marketing, Business and Office Specialists*. Chicago: Ferguson, 1970. (342 pp.) Career information on over 300 business-related careers.

Wilinsky, Harriet. *Careers and Opportunities in Retailing*. New York: E.P. Dutton and Company, 1970. Examination of careers and advancement opportunities in retailing.

"Your Career in the Lodging Industry" (booklet). Educational Institute of American Hotel-Motel Association, Kellogg Center, East Lansing, Michigan 48823. Information on careers in the hotel-motel industry.

UNIT 8: ENTREPRENEURSHIP: DOING YOUR OWN THING

Teacher's Guide

OVERVIEW

ACTIVITIES	MATERIALS
A. *What Entrepreneurship Is All About* Students examine the pervasiveness of entrepreneurship in the American economy and why entrepreneurs succeed or fail.	Information Sheet distributed to each student.
B. *What Kind of People Are Entrepreneurs?* Students examine personal traits of entrepreneurs and experiment with occupational characteristics of independent business ownership.	Information Sheet for each student.
C. *I'd Rather Do It Myself* Students interview entrepreneurs to examine further the advantages and disadvantages of selecting this career option.	Entrepreneur Interview Form for each student.

OBJECTIVES

- Students will be able to define "entrepreneurship."
- Students will be able to identify typical occupational, personal, and life-style characteristics associated with entrepreneurship.
- Students will be able to identify skills required for entrepreneurship.
- Students will be able to chart alternative career paths for entrepreneurs in marketing and distribution.

RATIONALE

To broaden students' horizons on career opportunities in the field of marketing and distribution, a look at entrepreneurship is mandatory. Entrepreneurship represents a most plausible career option in this field since many marketing and distribution activities are provided by small self-owned businesses and many others began that way. Frequently employees in this field use their experience and interests to start their own businesses. As a career option, entrepreneurship attracts many people, and students should have a chance to consider why. It is important for students to realize that running one's own business requires special knowledge and abilities beyond the knowledge of the specific products and services.

An examination of the typical characteristics of entrepreneurship permits students to experiment further with their own interests, abilities and values, as they relate to potential career options in marketing and distribution. At this developmental stage, questions of independence, authority, ownership and decision-making have significance to the adolescent student struggling in a personal way with those very issues.

CONCEPTS

- An entrepreneur is one who organizes, manages and assumes the risk of a business or enterprise.
- Entrepreneurship is usually characterized by four elements:
  - the types of businesses typically involved
  - personal traits of individuals who become entrepreneurs
  - life style associated with entrepreneurship
  - occupational characteristics of entrepreneurship
- Entrepreneurship is usually associated with small, self-owned and managed businesses. However, entrepreneurship can apply to any form of business ownership and management, including large corporations. In fact, many large corporations began as small, self-owned businesses and grew through the efforts of the entrepreneurs who started them.
- Entrepreneurs usually show certain personal traits. These include: the desire to have control over decision-making, desire to have control over the rewards, the willingness to take risks, the desire to be one's own boss, energy, drive, ambition, independence and so forth.
- Life style elements associated with entrepreneurship often include long hours and deferred rewards. For example, entrepreneurs often reinvest the proceeds of the business rather than take high personal income. On the positive side, the ability to be independent and financial rewards are enjoyed by entrepreneurs.
- Occupational characteristics of entrepreneurship include independence in decision-making, and ultimate responsibility for the consequences of decisions. Freedom to act and to take credit for good decisions must be weighed against isolation in decision-making and personal liability for poor decisions.
- Entrepreneurship represents a frequent career path for persons in marketing and distribution. Many goods and services are marketed and distributed through small self-owned businesses.
- An entrepreneur must be knowledgeable about the product or service he/she is providing.
- Entrepreneurs also need skills in business management, operations and finance (e.g., accounting, personnel).

ACTIVITY A. ***What Entrepreneurship is All About***

Introducing the Activity

1. Explain that the word "entrepreneurship" is derived from the French word, "entreprendre" which means to undertake.
2. An entrepreneur is one who undertakes to operate his/her own business.
3. According to Webster's Dictionary, an entrepreneur is: "one who organizes, manages and assumes the risk of a business or enterprise".
4. Ask students if there is anyone they know who they consider an entrepreneur. Why?

5. Ask students if they ever acted as entrepreneurs themselves (e.g., operating their own lemonade stand).

   If so, why did they do it? What did they like about it? Was there anything they did not like about it? Did they earn any money?

6. Explain that entrepreneurship is widespread in the American economy. Many businesses which are currently large corporations started as small enterprises begun by one energetic individual. For example, many large hotel chains were started by entrepreneurs (e.g., Conrad Hilton and the chain of Hilton Hotels). Many of today's large department stores began as small stores or even peddler's carts.

7. Explain that small self-owned businesses today account for most of the businesses in the American economy.

Guiding the Activity

8. Pass out the Student Information Sheets.

9. Explain to students that entrepreneurship is especially widespread in the field of marketing and distribution. Point out that the Information Sheets provide an overview of what entrepreneurship is about in the American economy.

10. Define for students the following terms:

    assets: the properties owned by a business such as equipment, furniture, building, etc.

    gross receipts: the total sales of a business

    expenses: the costs of conducting business such as rent and salaries for employees

    profit: the amount of money left from total sales after paying for expenses and taxes. For example, if a clothing store sells $100 dollars worth of clothes in a day, its gross receipts for that day are $100. If it costs the store $25 a day for rent, personnel, taxes and other expenses, and $50 for the cost of goods sold, the profit for that day is $25.

    proprietorship: a business which is owned by one person

    partnership: a business which is owned by more than one person

    corporation: a business which is owned by stockholders whose personal liability for loss is limited by law

Learning More From the Activity

1. Ask students, based upon what they have read, whether they find entrepreneurship attractive for themselves? Why?

2. Based upon what they learned about the reasons for success and failure of small businesses, what occupational experience in marketing and distribution helps prepare someone for this type of enterprise?

3. Ask the class to give reasons why they think someone would decide to become an entrepreneur.

Points to Stress

- Entrepreneurship represents a frequent career option for persons involved in marketing and distribution activities.
- Entrepreneurs must not only be knowledgeable about their product and services, but also must possess skills for running this type of business.
- Many opportunities for entrepreneurship exist today.

ACTIVITY B. *What Kind of People Are Entrepreneurs?*

Introducing the Activity

1. Explain to students that entrepreneurs share ambitions, preferences and certain personal traits. Entrepreneurship satisfies these ambitions and preferences and requires certain personal traits (e.g., independence).

2. Distribute to each student the Information Sheet on *Entrepreneurs as People*.

3. The most decisive characteristics of entrepreneurs are: willingness to take risks and desire to be "in charge."

4. In addition, entrepreneurship involves certain occupational characteristics.

5. One of these characteristics is that the entrepreneur is frequently the only person involved in the business.

6. Ask students how they would like being the only person in an office? Would they get lonely? Would they like the fact that they could work alone?

7. Another characteristic of entrepreneurship is that responsibility for decision-making lies with the individual. The only feedback on an action or decision is whether a customer buys the product or service. In larger businesses, responsibility for decision-making is usually shared. (The ultimate test of the soundness of a decision is, however, the same.)

This does not mean that entrepreneurs cannot seek advice or work with other people. However, the typical structure of a small business has one or few managers and decision-makers. Other employees operate at the level of assistant salesperson, with few positions in-between.

Guiding the Activity

8. Have the students draw a picture of a house in the summertime.
9. Have students hold up their pictures.
10. Do not say anything about the pictures.
11. Have the class draw a picture of a house in a storm.
12. Have them hold up their pictures. This time comment on some of the pictures in terms of what is effective and not effective about them. Ignore others.
13. Ask the class if they felt more comfortable the second time in which you provided them with some feedback on what they had done. Elicit from the class why they might have felt more comfortable that time.
14. Explain to students that the entrepreneur often experiences more of the first situation than the second.
15. Point out that a person must have strong confidence in his/her judgment and not need much feedback. Ask students who received no feedback the second time how they felt. In determining if one is interested in becoming an entrepreneur, this need for feedback or ability to function without it should be assessed.
16. Call 3 volunteers to the front of the class.
17. Pair off 2 of the students. The other student is to work alone.
18. Explain to the 3 students that they are the owners/managers of a supermarket. The supermarket needs to hire a head sales clerk. Before they can begin the process of hiring, they have to write a job description of the head sales clerk–what skills the person needs, and other qualities about the job.
19. The pair can work together in developing their job descriptions. The third student must do his/hers alone.
20. Allow about 5 minutes for developing the job descriptions.
21. After the job descriptions are written, ask the pair and the student who worked alone how they went about writing the job description.
22. While they are writing you should observe such things as the interaction of the pair, as compared to the student who is working alone.

Learning More From the Activity

1. Point out to the class that making decisions alone is a common feature of entrepreneurship.
2. Also, point out that this has positive and negative aspects. For example, the person working alone may be able to complete the task faster and enjoy greater freedom of action than persons who have to work with other people to reach a decision.

Points to Stress

- Entrepreneurs can experience both greater freedom and greater loneliness; greater rewards and greater losses.
- The important thing is for persons considering entrepreneurship to examine these characteristics in light of their own interests, abilities and values. A person who needs frequent praise and/or instructions should be aware of this need and recognize that it may not be fulfilled by entrepreneurship. Such a person might consider entering partnership with other individuals to share the responsibilities and rewards of self-employment.

ACTIVITY C. *I'd Rather Do It Myself*

Introducing the Activity

1. Reiterate to students that entrepreneurship allows people to "be their own boss," benefit more directly from their own efforts, and have a sense of accomplishment.
2. Tell students that in order for them to better understand the nature of entrepreneurship, they are going to interview entrepreneurs in their community.

Guiding the Activity

3. Pass out the interview forms to each of the students.
4. Students in teams of 2-4 can interview entrepreneurs.
5. As an option to community exploration, invite entrepreneurs to serve as guest speakers/interviewees in the classroom. At this time, students can ask them the questions in the interview forms. This, however, may be difficult if the entrepreneur has nobody else to "mind the store."

Learning More From the Activity

1. Have students give results of their interviews.
2. Ask questions such as: Did most of the entrepreneurs have previous job experiences which helped them in starting their own business? What types of rewards did most of the interviewees identify? What types of disadvantages?
3. To synthesize learning from the three activities, have the class generate a list of the pros and cons of entrepreneurship.
4. Point out again that there are many advantages and disadvantages to operating one's own business. Much of its success and satisfaction depends upon the specific interests, abilities and values of the individual.

Points to Stress

- Entrepreneurship represents an attainable career option for persons interested in the field of marketing and distribution.
- It is important to know what entrepreneurship requires to determine if it is a suitable occupational choice.

Performance Criteria

Students will be able to list 5 advantages and 5 disadvantages of entrepreneurship.

Students will be able to identify a field in which they might wish to own their own business and to explain why they think they would enjoy being entrepreneurs or not.

RESOURCES AND REFERENCES

Haules, William D. and Hubbard, Raymond T. *Small Business Management, Vols. I and II.* Albany, N.Y.: Delmar Publishers, 1965. Text workbooks designed to be outline and guide for the successful operation of a small business.

'Starting and Managing Series." Small Business Administration, Washington, D.C. Booklets that describe how to plan and operate a small business, including sales promotion, financing and examination of personal factors relative to each business. A representative selection is indicated below.

Chidakel, Myer R. *Starting and Managing A Car Wash.*

Erlandson, Ray S. *Starting and Managing A Small Retail Music Store.*

MacArthur, Jean (ed.). *Starting and Managing a Retail Jewelry Store.*

Ross, Joe and Gores, Stan. *Starting and Managing A Pet Shop.*

UNIT 9: ALTERNATE ROUTES TO CAREER GOALS

Teacher's Guide

OVERVIEW

ACTIVITIES	MATERIALS
A. *Let's See How Charlie Moves* Students examine an individual's work history to illustrate the importance of making the most of previous work experiences in seizing future opportunities.	Career Paths, Chart, for each student; Case on Charles Pinkley for each student.
B. *Moving On Up* Students examine how skills are related among jobs.	List of Job Choices for each student.
C. *Stepping Along* Students develop a career path to illustrate that career paths represent a dynamic history as well as an enabler for the future.	Listing of Job Descriptions for each student.
D. *Schooling for Moving* Students examine the many educational options available to persons interested in pursuing careers in marketing and distribution.	Student Information Sheet, Decision Tree on Educational Options, for each student.

OBJECTIVES

- Students will be able to chart career paths.
- Students will be able to describe alternative career paths for selected marketing and distribution occupations.
- Students will be able to identify and locate education and training resources for careers in marketing and distribution.

RATIONALE

In keeping with the commitment to develop career decision-making skills in students so that they have the ability to grow, develop and adapt, it is essential that students study directly the concepts of career mobility and career paths.

This unit reinforces these concepts–i.e., relationships between education and jobs and among jobs. It demonstrates that there is more than one route to attaining the same career goal. It illustrates that formal education and training are not the only components of a career path, or always necessary components. Other components are previous work experiences and training in related fields (e.g., training in repairing televisions may be useful in obtaining a job as a sales representative for televisions).

Nevertheless, students should be made aware of the fact that careers in marketing and distribution require education and training as a prerequisite to employment. In order that they may combine this concept with several concepts of career development, this unit attempts to teach how to go about 1) determining what the requirements for a specific job are, 2) identifying the resources for obtaining these requirements and, 3) identifying relationships between jobs.

The unit illustrates that career paths not only help to identify future plans, but also document previous work histories, thereby outlining both current and future career opportunities.

CONCEPTS

- Identifying and obtaining related skills for several occupations is necessary in order to be mobile in career choices.
- An effective vehicle for achieving a long-term career goal is experience in related jobs.
- Career mobility is not limited to advancement. One can move both "laterally" and "upward," to achieve a career goal.
- Lateral movement refers to using the skills obtained on one job on another job with essentially equal levels of responsibilities.
- Upward mobility refers to using some of the skills gained on one job on another job which requires more skills and/or greater responsibility than the previous job.
- Pursuing a career goal, individuals generally make both lateral and upward movements.
- The steps or movements an individual takes in achieving a career goal are referred to as the career path.
- It is important to identify possible career paths for achieving a career goal as part of the career planning process.
- For almost every career goal, there is more than one career path a person may select for achieving that goal.
- Even when an individual does not have a clear set of career goals, his/her job history may be termed a career path.
- Education and training is often a component of an individual's career path.
- In examining potential career paths for achieving a career goal, one must identify the extent to which education and training is required.
- In career planning, one is not committed to a single career path. As an individual's interests, abilities and values change over time or as opportunities arise, the paths an individual decides to pursue to achieve a career goal also change.
- It is useful to chart a career path in order to understand the various ways one can achieve one's ambitions.

ACTIVITY A. *Let's See How Charlie Moves*

Introducing the Activity

1. Explain to the class that there is more than one way or route for achieving the same career objective.
2. Sometimes individuals prefer to select an educational route, and other times a work experience route for achieving the same goal. Frequently, a combination of the two is necessary. Often no route is consciously chosen but people in similar positions got to them through different paths.
3. Examining career paths demonstrates that opportunities which arise may be grabbed if individuals

recognize how they may use their previous experiences to pursue new ones.

4. Education and training are important parts of career paths and career mobility. Ask students if they know of any jobs which specifically require education or training. A good example is a teacher. A teacher must have a certain amount of education, and usually training in teaching as well.

5. Ask students if they think of any jobs in which work experience in another job is required. A good example of this is a manager of a department in clothing store who needs previous experience as a buyer.

6. Pass out the chart *Career Paths* which illustrates alternative career paths an individual may take to attain the same occupation.

7. Explain that sometimes an individual may choose to move laterally. For example, a sales representative in home furnishings may decide to become a sales representative in hardware. The tasks, responsibilities and skills are similar.

8. Other times an individual may seek advancement. For example, the sales representative in home furnishings may seek the position of manager of sales in home furnishings.

9. Each type of movement enhances the individual by adding to his/her experiences and moves the person along to a career goal.

Guiding the Activity

10. Pass out the work history of Charles Pinkley.

11. Divide the class into small groups of 3-4 students.

12. Explain to the class that each group is to identify the lateral and upward movements in Charles' work history.

Learning More From the Activity

1. Have the students identify the lateral and upward movements in Charles' work history. Students should have to explain why they considered a move lateral rather than upward.

2. Have them identify the industries Charles has worked for.

3. Note that in Charlie's case, which is typical of many career paths, the movements follow a pattern of "step-to-the-side; step up." Job changes repeatedly involve a lateral movement, then an advancement.

4. Point out that one is not confined to any one industry in career development. There are skills which are related across jobs, and across industry types.

Points to Stress

- There is more than one way to achieve the same career goal.
- Mapping an individual career path should suit the individual's interests, abilities, skills, resources and opportunities.
- Making the most of one's previous experiences enables a person to seize future opportunities.

ACTIVITY B. *Moving on Up*

Introducing the Activity

1. Reiterate that previous job experience is often important to achieving a career goal.

2. It is important in career planning to be able to identify the skills related to more than one job and prepare for them. This provides flexibility and adaptability for the individual.

Guiding the Activity

3. Pass out the student instructions.

4. Students can work in pairs, or individually.

5. Explain that for each occupation, they should select the occupation which *best* provides the experiences and skills needed for it.

For example, SCHOOL PRINCIPAL: Actor
Teacher
Sales Clerk

Of the available choices, the job which provides the best experience for being a school principal is a teacher.

Learning More From the Activity

1. Review each of the occupations with the class and outline the tasks and responsibilities required for that job.

2. Elicit from students which occupations they feel prepare someone *best* for that career option.

3. You will note that there is no single correct answer. The important thing for students to identify is the related skills among jobs.

4. Point out that more than one job may provide some of the experiences and skills required for another job. For example, the skills involved in interior decorating would be useful for a furniture dealer in helping customers select appropriate furniture. Likewise, experience as an inspector would assist a furniture dealer in identifying flaws, etc., in furniture

he/she might purchase. Experience as a salesperson would provide the furniture dealer with the necessary skills in selling.

5. Point out that several job experiences which combine the required skills may be appropriate for achieving a career goal.

Points to Stress

- Obtaining related skills is important to career mobility and adaptability as interests and opportunities change.

ACTIVITY C. *Stepping Along*

Introducing the Activity

1. Explain to students that in the previous activity they used job titles as a way of identifying possible career mobility.
2. In this activity, they are going to use job descriptions and develop the steps in a possible career path.

Guiding the Activity

3. Pass out the Job Descriptions.
4. Pass out the chart or ladder to be used as a framework by students.
5. Explain to students that based upon the job descriptions they are going to choose career objectives and develop a career path for Ruth Hemmingway. This path (or ladder) should identify the jobs, in order, Ruth might seek to achieve her ultimate career objectives.
6. Have students develop ladder for famous persons such as the President of the U.S. This is a good opportunity to use biographies of real people, which adolescents enjoy, in relation to career development.

Learning More From the Activity

1. There is no one right answer or group of answers in this exercise. The important thing is for students to identify a career objective, and to select those occupations which will best prepare Ruth with the skills and experience needed to achieve that objective.
2. An example of such a ladder might be:

Career Objective: Account Executive

Account Executive
Booking Agent
Advertising Layout
Sign Writer
Sales Clerk, Supermarket
High School Distributive Education Program

Points to Stress

- The selection of work experiences by an individual depends upon the skills required for the ultimate career goal.
- Similarly, the experiences an individual has had permit him/her to take advantage of opportunities as they arise. It pays to do the best in every job—even in school. A career path is, therefore, a dynamic history as well as an enabler for the future.

ACTIVITY D. *Schooling For Moving*

Introducing the Activity

1. Explain to the students that education and training are components of career paths. They are "enablers," preparing individuals for specific occupations and job opportunities.
2. Sometimes education or training is *required* for a specific career objective.
3. Other times the individual chooses to go the route of education and training rather than the route of several work experiences. This generally permits the individual to begin at a better job.
4. It should be noted that often a combination of education and training, and work experiences is required for obtaining the skills necessary to achieve long-term career objectives.

Guiding the Activity

5. Describe the decision tree in the student materials which illustrate the various educational and training opportunities available in marketing and distribution.
6. Pass out the Student Information Sheet which briefly describes the nature of each of these types of resources.

Learning More From the Activity

1. Discuss each Student Information Sheet in terms of the level of competence achievable and nature of the institution.
2. Have students identify institutions of each type in their community.
3. As an option, have a career counselor or students obtain catalogues from these institutions to review the nature of courses and programs.

Points to Stress

- There are many educational options available to persons interested in careers in Marketing and Distribution.

- Education and training helps individuals begin at better jobs.

Performance Criteria

Students will be able to identify two alternate career paths in order to obtain employment in the marketing and distribution occupation which interests them most.

The career path analysis should include the following elements:

- Skills required for job
- Skills student possesses and those student must acquire
- Alternate methods of obtaining needed skills
- Possible sequence of jobs.

Students will be able to identify institutions and programs for training of each type (e.g., postsecondary, university,on-the-job) to prepare for a career which interests them in marketing and distribution.

RESOURCES AND REFERENCES

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UNIT 10: BASIC PRINCIPLES OF MARKETING AND DISTRIBUTION

Teacher's Guide

OVERVIEW

ACTIVITIES	MATERIALS
A. *Marketing* Students illustrate how marketing processes work via a pantomime with objects.	Student Information Sheet for each student; objects in the classroom
B. *Exchange* Students explain the fundamental concept of exchange by explaining it to an imaginary group of Kindergarten students.	Student Information Sheet for each student.
C. *Supply and Demand* Students identify how the concept of supply and demand is fundamental to our economy through experimenting with an example in a mini-game.	Student Information Sheet for each student.
D. *Market* Students illustrate the importance of market segmentation and identification of marketplace by defining each for a product and service.	Student Information Sheet for each student; listing of suggested products and services.
E. *Channels of Distribution* With pictures from magazines, students illustrate how products move through channels of distribution.	Student Information Sheet for each student; magazines.
F. *Value-Added* Students illustrate the concept of value-added by adding value to an object in their desks.	Student Information Sheet for each student.
G. *Profit* Students prepare a script to explain the concept of profit and the benefits derived from it to a group of foreign students.	Student Information Sheet for each student.
H. *Competition* Students develop a collage from newspaper clippings to illustrate the pervasiveness of competition among businesses in our economy.	Student Information Sheet for each student; newspaper.
I. *Risk* With examples, students explain the concept of risk to other members of the class.	Student Information Sheet for each student.
J. *Forms of Ownership* Students analyze how forms of Ownership depend upon nature of businesses by identifying different forms used by businesses in their community.	Student Information Sheet for each student.

OBJECTIVES

- Students will be able to define the concepts and principles which are fundamental to understanding marketing and distribution.
- Students will be able to explain the relationship between these concepts and principles in the total marketing and distribution system.
- Students will be able to explain the importance of understanding these concepts and principles to the career decision-making process.

RATIONALE

The conceptual scheme of this curriculum includes the examination of the basic concepts and principles of marketing and distribution, as well as a study of industries, businesses and occupations in the field. This approach is based upon the conviction that career decision-making will be enhanced and facilitated if occupational information can be related to the concepts common to the field and these in turn are integrated into a framework of career development concepts.

Especially in marketing and distribution, such an approach in both possible and essential. Economic processes and principles govern marketing and distribution independent of a particular product or industry of interest to the student. An understanding of these principles helps to organize career exploration of what otherwise might be a myriad of occupations too numerous to digest. With an understanding of the total system and occupational environment, students can better comprehend the characteristic operations of particular industries, and the place of specific careers and occupations within the whole as a basis for intelligent career decision-making. Further, for students who may decide not to pursue a career in marketing and distribution, the basic principles of the field are useful to them in any career pursuit and as consumers.

This unit begins with simple concepts, such as *exchange*, fundamental to an understanding of marketing and distribution, and proceeds to more complex concepts such as *value-added*. The initial concepts are essential for an understanding of marketing and distribution; the unit then proceeds to more complex elaborations of the basic processes.

CONCEPTS

- Before one can pursue a career effectively, he/she should understand the fundamentals of the system in which that career operates.
- An understanding of a total system includes a knowledge of the basic concepts and principles which govern that system.
- Economic concepts and principles are basic to an understanding of marketing and distribution.
- An examination of these concepts and principles enhances one's career decision-making ability about pursuing training for a career in marketing and distribution.

ACTIVITY A. *Marketing*

Introducing the Activity

1. Explain to students that they are going to be examining the concepts and principles basic to the marketing and distribution system.
2. Point out that part of the career decision-making process is identifying and understanding the context in which the occupations in the field are performed.
3. Such an understanding should enhance one's ability to determine if he/she is interested in pursuing further training for a career in this field.
4. Explain to the class that in the following activity they are going to examine the concepts of *marketing*.
5. As consumers, they should be aware that marketing is all around them and affects them every day.

Guiding the Activity

6. Use the Student Information Sheet on *Marketing*.
7. Divide the class into small groups of 3-5 students.
8. Each small group should be assigned to demonstrate the principle of marketing through actions. That is, students pantomime the process–no words will be allowed. They can use objects in their pantomime.
9. Allow each group approximately 20 minutes to develop their demonstration.
10. Each small group should present its demonstration of the principle of marketing to the rest of the class.

Learning More From the Activity

1. Reiterate that marketing encompasses all the links between production and consumption.
2. Point out that the needs and desires of the consumer are crucial to the marketing process.
3. Explain that economists use the word *utility* to denote the capacity to satisfy human wants. Both

production and marketing processes add utility to products and services.

4. There are four major types of utility—form, place, time and possession.

5. They are defined as follows:

   form: extracting goods and changing the structure or shape to satisfy human wants (e.g., crude oil to gasoline; lamb's wool to cloth).

   place: transferring goods to the place where they are needed.

   time: keeping the goods until they are needed.

   possession: supplying the processors, merchants and consumers with the goods.

6. The production process adds *form utility* to products.

7. Marketing processes add *time, place* and *possession utility* to products. Without marketing, consumers could not obtain goods in a usable place or time.

Points to Stress

- Marketing is an integral part of our economic system.
- Marketing is all around us.

ACTIVITY B. *Exchange*

Introducing the Activity

1. Explain that marketing is essentially a process of exchange—i.e., buying and selling.

2. Explain that all marketing activities are directed towards the process of buying and selling. Basically, buying and selling involves exchanging something you have to offer for something you want which someone else has to offer you.

3. Ask students if they can think of times when they have exchanged something they have for something a friend has. Examples might be records, books, etc.

4. In our modern economy, instead of exchanging goods for goods (barter), we use money to simplify the exchange process. If someone has something we want, we purchase it with money.

5. Money is a good medium for exchange because it enables party A to purchase a product or service from party B even if A has no product or service which B needs.

Guiding the Activity

6. Students should remain in small groups.

7. Use the Student Information Sheet on *Exchange*.

8. Explain to each small group that they are going to explain the concept of exchange to a group of Kindergarten students. Therefore, remind them to be selective in their vocabulary and examples.

Learning More From the Activity

1. Point out that persons as young as Kindergarten students are familiar with the concept of exchange.

2. Ask students if they can think of examples in our society in which goods for goods or services for services is still the basis for exchange. (Point out informal examples, such as taking turns baby-sitting.)

Points to Stress

- Marketing is fundamentally a sequence of exchanges.
- Exchange of value underlies buying and selling of a product or service.

ACTIVITY C. *Supply and Demand*

Introducing the Activity

1. Explain to the class that the concept of exchange is based upon the demand for a product or service versus the supply of that product or service.

2. For example, a new record has recently come out. You and many of your friends wish to own this record. Therefore, there is a *demand* for this record by you and your friends.

3. Based upon this demand (or expected demand), the record stores in your community *supply* themselves with this record. They would not supply themselves with this record if they did not think there would be a demand for it. Nor would the record have been produced if no demand for it was forecast.

4. The extent of demand and amount of supply determines the cost of the product or service. To elaborate upon the previous example, let's assume that all the record stores in the community sell out of the record in demand. A friend has purchased it, and you wish to buy it from the friend. You may be willing to pay more for the record from the friend than the friend paid for it in the store because it's the only one you can get—i.e., the supply is limited.

5. As another example, suppose that every soda fountain in your community sells milk shakes. However, one soda fountain charges more for a milk shake than the others. Since you can go almost anywhere

to get a milk shake (the supply is great), you are not willing to pay the additional cost for one. If few people buy the high-priced shake, the seller is likely to reduce the price to attract buyers (i.e., increase the demand).

Guiding the Activity

6. Use the Student Information Sheet on *Supply and Demand.*
7. Divide the class into approximately 10 teams of 2-3 students each. Eight of the teams will be buyers. Two of the teams will be sellers.
8. Tell the buyers that each team has $5 to spend on purchasing meat for one meal for a family of four.
9. Tell each selling team that they each have 4 units of chicken to sell. Last week's price was $3.50 for enough to feed a family of four.
10. Permit the buying teams to circulate freely to make their purchase. Both buyers and sellers should note down the price.
11. Each selling team should decide on this week's price and post it at their seats. *They may change the price as the activity progresses.*
12. Permit each buying team to circulate freely to make their purchases. Both buyers and sellers should note the price of the purchase or sale.
13. Sellers should keep track of how many units of the 4 they have left.

Learning More From the Activity

1. Have each seller post on the blackboard the price of each unit of chicken in the order it was sold.
2. Ask sellers to explain any changes in price. Note especially the direction of prices as the activity proceeded. Expect that prices rose as supply dwindled.
3. Ask buyers who bought at the lowest price(s) to describe their experience with the seller. Do the same for buyer who bought at highest price.
4. Expect that the last buyer to make his/her purchase is at an obvious disadvantage because with only one unit left, the seller can raise the price as he/she wishes. Expect that an early buyer might refuse to purchase at a high price if he/she perceived that the seller would need to get rid of his/her supply and would therefore need to set a reasonable price. Further, an early buyer could go to a different seller.

Points to Stress

- Supply and demand influence the price of goods.
- More buyers are willing to purchase a product if the price is low. Fewer buyers can or will purchase a product at a high price.
- When goods are scarce, sellers can expect to get high prices. When goods are plentiful, sellers will lower the price to "move" the goods (i.e., attract more buyers to consume the supply).

ACTIVITY D. *Market*

Introducing the Activity

1. Explain briefly that there are two uses of the word "market."
2. One definition refers to the place where goods and services are exchanged. For example, an automobile dealership represents a marketplace for the buying and selling of automobiles.
3. The other definition of a market refers to segmentation of the consumer population. Businesspersons realize that not everyone wishes or is able to purchase their product or service. To assist the businessperson in attracting consumers, the types of consumer to whom advertising should be directed, or near whom the business should be located, etc., must be identified.
4. For example, an owner of an expensive clothing store for women has identified his/her market as adult women of a certain income level. Based upon this market, the owner of the clothing store may decide to locate in a part of town which serves upper-income women, and/or the owner may decide to advertise his/her clothing in a magazine such as *Vogue* rather than one which has a younger audience such as *Seventeen.*
5. Reiterate that many key marketing decisions are based upon the market segmentation for the product or service as defined by the businessperson.

Guiding the Activity

6. Use the Student Information Sheet on *Market*, including the list of products or services.
7. Each small group is to select a product or service from the list.
8. Then, each small group is to define the market for the product or service. They should identify such factors as: age, sex, income, region, or any other factors which describe the consumer for the product or service.
9. Point out to students that there may be more than one type of market for a given product or service.

They are to act as if they are businesspersons about to open a business. Therefore, they must define the market for *their* business, and justify it.

10. After each small group has defined the market segmentation for their product or service, they are to identify the marketplace in their community for selling this product or service, that is, whether it should be sold near a school, in a shopping mall, in an exclusive area of town, etc. They should use specific areas in their community for defining their marketplace.

Learning More From the Activity

1. Have each small group explain to the rest of the class their product or service, market segmentation, and marketplace. They should explain why they segmented the market the way they did and why they chose the selected marketplace.
2. Ask students to describe their class as a market segment for certain products. They should indicate age, sex, income, etc., as well as spending habits and preferences for a particular product.
3. Point out that market segmentation is crucial to many key decisions regarding the marketing of a product or service.

Points to Stress

- A market, as in marketplace, is a place where exchange activities take place.
- A market, as in market segmentation, represents a profile of the consumer for a product or service.
- Identifying market segment is critical to the successful operation of a business.

ACTIVITY E. *Channels of Distribution*

Introducing the Activity

1. Point out to students that they have previously experimented with the channels of distribution in the simulation game.
2. Explain that in addition to buying and selling, marketing provides for the physical distribution of goods. In order to physically move products, marketers must select a channel for distributing them.
3. Point out that the selection of a channel for distribution is based upon several factors. One factor is cost: if the channel from producer to consumer is direct, the costs may be minimized. A good example of a direct channel of distribution is direct mail order through a manufacturer's catalogue.
4. It should be noted, however, that direct channels do not always result in lower prices for the product or services. For example, it may cost the producer more to maintain a sales force than to sell to retailers.
5. Another factor which may contribute to the producer's selection of channel is the degree of training needed by the sales force. Among producers which sell directly are business equipment manufacturers. To sell this equipment, the sales representative must be specially trained. Other factors play a role in this decision.
6. Examples of products which are better sold through independent retailers are toothpaste, tissue and food products. These products do not require specialized selling skills. They are usually sold in self-service stores.
7. When the producer sells through a retailer, the channel is referred to as indirect.
8. Another factor in decisions regarding selection of channels of distribution is size and location of market. For example, if a product is used widely across the country, it may be more efficient for the producer to sell to independent retailers. On the other hand, if the product is fairly specialized and only used in certain locales, it may be more efficient to sell the product directly. Other characteristics of each industry and business influence the decision.
9. Another factor in deciding channels of distribution is the degree of control the producer has or wants over the promotion, service and price of the product. If it is sold directly, the producer has more accurate knowledge about what the consumer is looking for, what helps to promote the product, and whether the services promised are delivered.

Guiding the Activity

10. Use the Student Information Sheet on *Channels of Distribution*.
11. Students, in small groups, should use the product in the previous activity.
12. Students should cut out pictures in magazines and put these pictures together in proper sequence to illustrate channels of distribution for their product. Point out that for some products more than one type of retailer may be appropriate. For example, toothpaste is sold at a variety of types of stores such as supermarket and drug store.

Learning More From the Activity

1. Have each small group present and explain their

pictorial representation of the channels of distribution for their product.

2. Part of the presentation should include the rationale used by the group for selecting this type of channel.

Points to Stress

- In addition to buying and selling, marketing provides for the physical distribution of goods.
- There are many factors which contribute to a selection of channels of distribution.

ACTIVITY F. *Value-Added*

Introducing the Activity

1. Explain to the class that as a product moves from producer to consumer, it gains in value. For example, a typewriter may be a good, useful instrument once it is ready at the factory. However, getting it to the consumer, and explaining its uses to the consumer has added value to the product for the consumer.
2. Point out that what happens to a product between the time it is ready at a factory and the time it reaches the consumer adds value and cost to the consumer.
3. Point out that almost every product or service has value added to it, even if the initial product does not change in form.
4. Value added to raw materials by changing form is easy to understand. Taking oil from the ground and making it into gasoline adds value to the oil; or turning milk into butter adds value to the milk.
5. The ultimate consumer is concerned with the end product, and pays for the value added to that product as it moves through the system.

Guiding the Activity

6. Use the Student Information Sheet on *Value-added.*
7. Tell each student in the class to take an object from his/her desk and to add value to that object. (Students can do a variety of things—e.g., make a drawing on a blank piece of paper, sharpen a pencil, etc.)

Learning More From the Activity

1. Have each student display and explain the value added to the object.
2. Point out that many occupations in our complex society are involved in activities which add value to products or services.

Points to Stress

- Many persons are involved in the process between production and consumption. The role of each person adds value to the product as it proceeds through the system from producer to consumer.

ACTIVITY G. *Profit*

Introducing the Activity

1. Explain to the class that there are many activities, decisions and risks involved in operating a business. Often the primary incentive to businesspersons for incurring these costs and risks is profit.
2. Profit is the amount of money earned by the business after the business has paid its expenses, taxes and cost of the goods sold.
3. For example, if a business takes in $100 in sales, and the costs of staff, rent, taxes, insurance, etc., is $25, and the cost of goods sold is $50,–the profit for the business is $25.
4. The profit represents the rewards earned by the business.
5. Profit is used in a variety of ways. Sometimes profit is the means by which the owner of the business pays him/herself. Other times profit is used by the business to invest in new equipment, supplies and staff. Profit may be used to invest in a different type of enterprise. It may be distributed to people who share in owning the business.
6. Therefore, profit is not only the incentive which motivates new businesses, but also the wherewithal for investing in new ideas, services and products.

Guiding the Activity

7. Use the Student Information Sheet on *Profit.*
8. Explain to each small group that they have to prepare a script for explaining the concept and benefits of profit to a group of foreign students.

Learning More From the Activity

1. Have each small group present their script on profit to the class.
2. Point out that in many societies profit is not used as an incentive to motivate business.
3. Ask students to describe other economies which are not centered around the concept of profit.

Points to Stress

- Profit represents the incentive which motivates the start-up and operation of businesses in our society.

- Profit provides the wherewithal for investing in new ideas, services and products and for rewarding successful ones.

ACTIVITY H. *Competition*

Introducing the Activity

1. Explain that competition involves a contest to "win" a reward, which usually exists in limited quantity (e.g., one best player).
2. For example, in a football or tennis game, you compete for best performance.
3. In sports, winning is determined by number of points.
4. In business, winning is determined by obtaining a designated share of the market (number of consumers) or amounts of money.
5. Explain that the concept of competition is basic to our economic system.
6. Ask students if they can think of ways in which business compete.
7. What do they think are some of the advantages of businesses competing?

Guiding the Activity

8. Use the Student Information Sheet on *Competition*.
9. Assign each student to comb the evening newspaper and to cut out examples of competition among businesses. Each student should make a collage of his/her examples.

Learning More From the Activity

1. Have each student present and explain his/her collage to the rest of the class.
2. Point out that competition among businesses in our economy is basic to the concept of free enterprise.

Points to Stress

- Competition is basic to free enterprise.
- Competition offers advantages to the consumer (e.g., lower prices, more variety, better quality, more service).
- Although in a sports competition there is only one winner, in business there can be more winners.

ACTIVITY I. *Risk*

Introducing the Activity

1. Explain to the class that there are several types of risks associated with operating a business.
2. Point out that one major risk is the risk of failure—that is, the business will not be able to meet its expenses and will have to close.
3. In addition to the risk of failure are the ordinary risks of theft, fire, forgery, damage, etc.
4. To reduce the cost of these adversities, the business person buys insurance.
5. Insurance merely promises that "all will not [illegible] lost" due to fire, theft, etc. It provides the mon[illegible] to compensate for the loss, to some extent.

Guiding the Activity

6. Use the Student Information Sheet on *Risk*.
7. Each small group of students must explain and demonstrate the concept of risk, with examples, to the rest of the class.

Learning More From the Activity

1. Point out that the degree of risk varies with each business.
2. Some people are more willing to take risks than others.

Points to Stress

- There are several types of risks associated with operating a business.
- There are ways to insure against risk.

ACTIVITY J. *Forms of Ownership*

Introducing the Activity

1. Explain that businesses organize themselves in several ways in order to perform their marketing functions, and to achieve the goals of earning profit.
2. There are advantages and disadvantages associated with each type of ownership.
3. In sole ownership the advantages include the ability to make all the decisions for control over profits. Some of the disadvantages of sole ownership are that the owner must service all the capital, the business is totally dependent upon the health of the owner, and the owner is liable (i.e., can be sued for the debts and losses on the business).

4. The advantages to a partnership are that several people put in capital and decisions may be shared. Disadvantages include possible disagreement among partners, disinterest or lack of contribution of one partner which may affect the livelihood of all the partners, etc.
5. Corporations have the major advantage of limited liability. They can continue to exist after the death or illness of founder, and the owner(s) cannot be personally sued for the debts of the corporation. A corporation can be owned by one individual. Usually there are tax advantages to corporations.
6. As with the other forms of ownership, there are advantages and disadvantages to *franchises*. The advantages include assistance in advertising, financial assistance, training, etc. On the other hand, there is a great deal of control exercised over the franchise in terms of advertising, quality control, etc.
7. Point out to students that decisions regarding forms of ownership are considered in light of the nature of the business (e.g., risk) and the persons involved in it.

Guiding the Activity

8. Use the Student Information Sheet on *Forms of Ownership.*
9. Each small group must identify in their community 3 examples of each form of ownership.
10. Explain that in cases where they are unsure, they should call or visit the business to determine the type of ownership.

Learning More From the Activity

1. Have each group list the businesses in the community which represent each type of ownership.
2. Then the class should examine whether there are any similarities between type of business and form of ownership. For example, are most insurance companies corporations. Are most boutiques sole ownerships? There may be no patterns discernible. The form chosen depends on many factors (e.g., person does not know how to go about starting a corporation or does not wish to pay the legal expense).

Points to Stress

- The form of organization chosen by a business depends upon the nature of the business, and the persons involved in it.

Performance Criteria

Student should be able to define each of the 10 terms of concepts addressed in the unit. For example, ask students to write a sample *definition* of each of the 10 concepts or to describe in writing an *example* of exchange, a market, risk.

Ask students to predict the price of a given product or service as the demand for it increases and decreases, or as the supply increases and decreases.

For example, during the summer the supply of peaches is plentiful. What is the price (use local examples)? As the summer passes, the supply of fresh peaches begins to decrease. What happens to the price? What is the price of peaches in the late spring as the first peaches arrive in the markets?

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UNIT 11: COMMON SKILLS IN MARKETING AND DISTRIBUTION

Teacher's Guide

OVERVIEW

ACTIVITIES	MATERIALS
A. *Interpersonal Skills*	
I. **Consumer service**. Students learn the importance of consumer service by analyzing case studies.	Student Instructions and Eight Case studies for each student
II. **Employee-Employee relationships**. Students role-play situations requiring interpersonal skills in dealing with fellow employees.	Two sets of role profiles: One set for each pair of students.
III. **Employer-Employee negotiations**. Students practice interpersonal skills by role-playing a conflict situation.	Student Instructions and store description for each student. Two role profiles, one profile to each team.
B. *Communications Skills*	
I. **Verbal communication**. Students practice communications skills by giving presentations.	Student Instructions and List of Topics for each student.
II. **Non-verbal communication**. Students demonstrate communication without words in a pantomime.	Product and occupation sheets for teacher. Student Instructions for each student.
C. *Interpersonal & Communication Skills in Review*	
Students assess interpersonal and communications skills of marketing and distribution employees through observation.	Student Instructions and Observation Guide for each student.
D. *Recordkeeping and Money Management*	
I. **Gina's Itinerary**. Students examine and experiment with the need for recordkeeping in different marketing and distribution occupations.	Student Instructions for each student.
II. **Gina Sells**. Students develop further understanding of recordkeeping and experiment with money management in marketing and distribution occupations.	Student Instructions for each student. Sales Agreement Form: 3 for each group of 4-5 students.

OBJECTIVES

- Students will demonstrate basic interpersonal skills.
- Students will demonstrate basic communications skills.
- Students will be able to identify effective and ineffective interpersonal and communications behaviors among marketing and distribution employees.
- Students will be able to explain the importance of recordkeeping in marketing and distribution.
- Students will be able to perform basic recordkeeping skills.
- Students will be able to explain the necessity of accurate money management in many marketing and distribution occupations.

RATIONALE

Businesses and occupations in marketing and distribution are involved in promoting or facilitating the movement of a product or service from the producer to the ultimate consumer. A critical objective of distributive businesses is to satisfy the needs of the consumer. In doing so, these businesses identify consumer demands, satisfy demands through direct contact with a consumer who may be another business or the ultimate user of a product, and provide ancillary services to assist the consumer.

Because marketing and distribution businesses are consumer-oriented, there are certain characteristics which most marketing and distribution employees must possess if they are to perform their jobs effectively. The characteristics include interpersonal and communications skills. Recordkeeping and money management skills are also central to effective job performance in marketing and distribution.

Interpersonal and communications skills, or human relations skills, are obviously important in a consumer-oriented business since success in business depends on effective face-to-face contact with others. Of course, human relations skills are important in all fields of human endeavor. In this unit students investigate not only consumer relationships but relationships among employees and between employee and employer.

Recordkeeping skills are important because records support efficient business operation and customer services. Poor recordkeeping may mean dissatisfied customers as well as business losses.

Consistent with a "learning by doing" approach, students perform as well as study some of the common skills central in marketing and distribution occupations.

CONCEPTS

- Many occupations in the field of marketing and distribution require that the employee have effective interpersonal and communication skills; knowledge of managing money and ability to keep efficient and accurate records.
- Interpersonal and communication skills relate to the effectiveness with which people interact with one another.
- Many marketing and distribution occupations involve the provision of a service to a client or customer. The quality of service provided is a very important element in the success of the business. Service requires effective interpersonal, communication and, often, recordkeeping skills.
- To insure a pleasant working environment, effective interpersonal skills are necessary not only with clients and customers, but also in relationships with fellow workers.
- Effective communication skills are critical to the success of many marketing and distribution employees. They include speaking clearly, listening attentively, responding to the other person, and so forth.
- Recordkeeping involves keeping track of money, flow of customers, services provided, equipment and so forth.
- It is central to the operation and success of a business that records are kept in an efficient and accurate manner.
- It is important to the career planning process to identify and examine the skills common to many of the occupations in that field.
- Experimenting with the skills common to many occupations in a field is an effective way to explore the nature of the occupations, and the suitability of the occupations to one's own interests, abilities and values. It also provides the beginning for obtaining skills relevant to many occupations.

ACTIVITY A. *Interpersonal Skills*

I. Consumer Service

Introducing the Activity

1. Discuss with the class the fact that in businesses

which provide a service and have direct contact with the consumer, interpersonal skills are extremely important.

2. Explain that interpersonal skills include all the ways in which people relate to each other. In marketing and distribution businesses, employees who have these skills are pleasant and friendly, able to make people feel at ease, responsive to customer's requests, able to give advice, show respect to customers, etc. This basic set of attitudes reflects a *service* orientation.

3. Tell the class that in this exercise they will study cases which illustrate problems in interpersonal relations. Each case focuses on the customer and the service which the business or its employees provides to that customer. Students must select the best solution to the problem posed and explain the basis of their choice.

Guiding the Activity

4. Divide the students into small groups.

5. Each group is to analyze each case, discuss it, and choose the best solution or solutions from the choices following each case.

6. When students are finished, bring the class together to share their choices.

Learning More From the Activity

1. Discuss with students their responses to each case study. You may refer to the materials in 4 below for specific points to raise on each case.

2. Note that sometimes there is more than one correct action or that there may be a combination of actions in providing good customer service.

3. Encourage students to suggest other actions besides those listed.

4. Specific points of case studies which should be discussed:

   Case One: Basic Principle. Often a customer needs advice on what to buy. The thing to do is to provide the advice and not turn him away or pass him on to someone else.

   Possible correct actions are:

   #4–Question John Bailey about the characteristics of the new car dealership.

   #5–Offer to go and visit the new car dealership.

   Both of these options should be followed up by the following two options. One without the other is an incomplete response to the customer.

   #6–Advise John Bailey on which parts to buy

   #7–Advise John Bailey on how many parts to buy

   It is also possible for students to select option #8–Suggest that John visit a similar car dealership to find out what parts they stock–in order that the sales worker is better able to advise John on which parts to purchase and how many of each part to purchase.

   Case Two: Basic Principle. It's important to listen carefully to customers' requests and to allow them to explain, in detail if they like, the nature of the service they wish provided. Ignoring the customer or cutting him/her off with a comment like "we give special attention to all our cleaning" is bad for business. Other customers may be annoyed about the delay, but they should see that the basic service being offered to one customer reflects care and attention which they can also expect to receive.

   Possible correct responses are:

   #2–Ask Betsy what caused the strain.

   #3–Let Betsy explain how she wants the dress cleaned.

   #7–Serve Betsy as he/she would any other time, i.e., when there are not a lot of people waiting.

   Case Three: Basic Principle. All customers, no matter what their appearance, should be treated with the same amount of courtesy and respect. There is no reason to assume, in fact, that one can afford the product more easily than the other.

   Possible correct responses are:

   #1–Wait until one of the customers asks to be served.

   #7–Wait on the poorly dressed woman first and start by telling her the prices of some of the watches.

   The last option is probably more acceptable since she was the first to arrive at the counter. However, in some stores the policy is to wait until the customer asks for service.

   Case Four: Basic Principle. It is always important to be friendly and pleasant to customers, even if you're feeling harried and irritable.

   Possible correct responses are:

   #3–Ask one of the two beauticians if they would take the new customer.

   #5–Tell the customer in a friendly and pleasant way that she couldn't help but would be glad to make an appointment for another day.

Case Five: Basic Principle. It is important to be able to get along with all kinds of people particularly if you are in the Complaint Department of a store.

Possible correct actions are:

#3–Get the manager of the Complaint Department to talk with the woman (especially if she refused to listen to your response).

#4–Pleasantly and firmly explain the store's policy to the woman.

#6–Try to arrange for the store to have the sweater steamed and blocked to see if they could get it back to its original size (only suggest this action if it is a possible solution to the problem).

Case Six: Basic Principle. In any business, it is important to be able to put the customer at ease. The agent couldn't promise Bill that the damage would be paid for; all he could do is try to put him at ease and get the facts of the case.

Possible correct actions are:

#2–Offer to get them both a cup of coffee.

#5–Let Bill finish and then question him in a reassuring way about the facts of the case.

Case Seven: Basic Principle. In business, the staff of the business have to be able to take criticism without getting angry, especially if there is some justification for criticism.

Possible correct responses are:

#2–Explain in a calm and pleasant manner why the prices aren't marked.

#3–Summon a clerk to shop with the woman and tell her what the prices are.

#5–Admit that the woman has a point and if she'll return in a few days the prices will be marked.

Case Eight: Basic Principle. It is important for the employee to be responsive to the requests of the customer. In some cases, it is impossible to be responsive to all of the customer's requests. However, the employee should make every attempt to satisfy as many needs of the customer as possible.

In the Hodgins' case, the least responsive action was to show them #3, which was expensive, not suburban, and had little land. Although none of the other choices fit all the Hodgins' demands, they responded to most of their needs.

Points to Stress

The major issue to be pointed out through these eight case studies is that in a service business–i.e., one that has direct contact with the customer, whether the customer is the ultimate consumer or another business–the employees must have good interpersonal skills.

- Providing advice is an important function in marketing and distribution occupations.
- It is important to pay attention to customer's requests for attention or special care. Although all customer's requests cannot be satisfied, employees should be as responsive as possible.
- All customers should be treated with the same courtesy and respect–even when it is with some effort by the employee.
- Being able to put at ease and get along with many kinds of people is necessary in marketing and distribution occupations.
- Employees must be able to take criticism of the service or product they provide.

Performance Criteria

Minimum acceptable performance: 6 out of 8 correct responses to consumer service case studies.

If student performance is below the minimum acceptable standard of 6 out of 8, re-administer the cases after the unit is complete in the following manner. Omit the choices of possible solutions and furnish to students *only* the case problem. Ask students to explain what the employee in the case should do in response to the problem and why that response would be an effective one. Assess student learning on the newly-presented cases in light of the notes in **Learning More From the Activity**.

II. Employee-Employee Relations

Introducing the Activity

1. Review the focus of the previous exercise which was on interpersonal relations between the customer and employee. This exercise will look at another important part of interpersonal skills for the job: the relationship between employees.
2. Remind the class that poor relationships between employees can have an effect on customer service as well as making work unpleasant for employees.
3. Ask the class what kinds of skills are important in employee interaction, e.g., listening to the other's point of view, learning to compromise.

Guiding the Activity

4. Pair off the class. Half the class will play the Redwick-Jones role; the other half will play the Olson-Widmark roles.

5. Assign a role to each number of the pair. Students do not need to switch roles in this exercise since the important point is in relating to one another in a constructive way, not in playing different sides of the story.

6. Remind the class that they have 15 minutes to play out their stories and then the class will meet to talk about what happened.

Learning More From the Activity

1. Ask the student what kind of compromises were worked out in the role-play. (Go around the class and have the students give examples.)

2. In each situation, what would be the advantages and disadvantages of going to the supervisor or employee?

Points to Stress

- An important part of human relations is learning to compromise and listening to another's opinion.
- Compromise involves each person listening to the other person's point of view in return for the same consideration in other areas on other points. That is, there are more than likely some points you feel more strongly about than others. You should be firm in trying to make these points prevail. On the hand, other persons may feel equally strongly about their viewpoints. Therefore, in compromise you should try to reach an agreement which is acceptable to both of you.
- In human relations, getting your own way is not as important as arriving at an understanding where each party respects the opinion of the other.

III. Employer-Employee Negotiations

Introducing the Activity

1. Explain to the class that this third exercise will focus on interpersonal relationships between employer and employee.

2. Explain that in all types of businesses, situations occur where employees feel that they have not been dealt with fairly by management or employers become irritated with employees. In some situations, dissatisfactions are only discussed among the workers themselves and not conveyed to the persons concerned (this frequently causes low morale). Since management is often in a position to rectify the dissatisfactions, it is important that employees learn to talk directly with management about their complaints.

3. Point out that in meetings between employers and employees, it is important that both the employer and employee listen to the other party, defend their position, and not buckle while working towards an agreement acceptable to both of them.

4. Tell students that this exercise is designed to provide them with practice in experimenting with human relations skills. It illustrates the type of negotiation which may develop between an employer and an employee. The conflict setting provides students with an opportunity to try out their human relations skills, not the least of which is patience.

5. Note that in this exercise students will be able to see one example of the many situations that management must deal with.

Guiding the Activity

6. Divide the class into an even number of teams of 5-6 students. Assign each team a letter. For example, one set of students is on Team A, the next Team B, the next Team C, and so forth.

7. Assign each team their role. Team A is the manager, Team B is the employee, Team C is the manager, and so forth.

8. Pair off the teams. Team A and B will negotiate, Team C and D will negotiate, and so forth.

9. Pass out the student instructions to the class. These instructions delineate the procedure and rules for the activity. For example, they explain that each team must prioritize the issues for the meeting before the actual meeting.

10. Discuss and review each point on the student instruction sheet with the class to be sure that they understand the operation of the activity.

11. Pass out the description of the company, Rowe's Discount Department Store, which describes the issues to be addressed in the meeting, to all students.

12. Pass out the employee (Head Cashier) profile to the student group role-playing the employee and pass out the Manager profile to the student group role-playing the manager.

13. Refer to student instructions for details of game operations.

14. Plan for 2 class periods: The first round of each team meeting to analyze and prioritize issues can be held during one class period. The actual meeting can be held during another class period.

Learning More From the Activity

1. In order to illustrate "good" and "poor" human relations skills, in the post-activity discussion, you should encourage students to first analyze their interaction in their own teams. For example a person in Team A may feel that other members of the group were not listening to him.
2. Students should then proceed to analyze the relationship between representatives of the groups. As you observe the groups and the representatives of the groups in the meeting, you should elucidate examples of the presence or absence of human relation skills. For example, you might point out to the students that one student was able to get agreement on his/her points, only after conceding on another point.

Points to Stress

- Tact and compromise are essential to good relationships.
- To effectively work with another person (or group of persons) one has to listen attentively to the other person's view.
- Even under extreme situations of conflict, one has to remain aware of human relationship skills. For example, yelling at someone does not convey the point better than discussing it in a reasonable tone of voice
- When you feel very strongly about a point, you must make every effort to convey your viewpoint.
- It is important to conduct yourself in a manner which will not interfere with a good ongoing working relationship.
- When an employee feels that he/she has not been dealt with fairly, it is necessary that the employee express his concerns to the manager, rather than "stewing' about what the employee believes to be an unfair situation. Sometimes a meeting to discuss concerns is initiated by the manager who notices that the employee is discontent. However, it is better for the employee to initiate this action rather than to wait for management to notice. When an employee initiates the action, it signifies to management that the issues are of significant concern to the employee and that the employee has some confidence in management's ability and willingness to help.

ACTIVITY B. *Communications Skills*

I. Verbal Communication

Introducing the Activity

1. Explain the concept of communication. Communication is anything we do to get our thoughts, feelings and ideas across to another person. It includes words, facial expression, and body language.
2. Interpersonal skills, which the class has analyzed and practiced in the previous activity, include communication skills. In this activity, the class will focus on verbal and non-verbal communication, however, and will not be concerned with interpersonal content.
3. In this exercise, each student will prepare a brief presentation of 2-3 minutes and present it to the class. Suggested topics are included in the Student Instructions as well as here.

Suggested Topics: Which One Do You Like?

An Effective Television Commercial

Select a television commercial which is especially effective and explain why it is an effective ad.

Consider who it is meant to appeal to; its visual and aural qualities; what characteristics the ad suggests users of the product have; etc.

Product Comparison

Choose a product and compare two or three competing brands of the product from the point of view of the consumer. Emphasize strengths and weaknesses of each competing brand (including quality and price) and make a recommendation as to which the consumer should buy.

Job Comparison

Compare two classified advertisements for the same occupation and explain which, if either, appears more desirable to you from the description in the newspaper.

Store Comparison

Compare two supermarkets in your community in terms of size, prices, range of products offered, services offered, etc., and indicate which, if either, offers more to the consumer.

Consumer Needs

Compare two types of restaurants and explain why the same consumer might patronize one type on a given occasion and a different type on another (e.g., fast food place for lunch; luxury for a special occasion).

Guiding the Activity

4. Distribute the Student Instructions to each student.
5. Ask them to prepare their presentations as homework.
6. During the presentations, try to control the 2-3 minute time allotment for each.

Learning More From the Activity

1. After the presentations, ask for constructive feedback from the students:
   - What was the major point of the presentation?
   - Were the thoughts clearly expressed?
   - Was information given concisely?
   - Was the speech clear?
2. Point out that *constructive* feedback itself is an element of interpersonal relations.

Points to Stress

- Communications skills, e.g, the ability to speak clearly and slowly, to make oneself understood, to give precise information, to maintain eye contact, are important skills in marketing and distribution occupations because much of the work involves direct contact with others.

II. Non-Verbal Communication

Introducing the Activity

1. The basic point of the exercise is to have students appreciate the fact that much can be communicated without the use of words.
2. Ask the class the significance of the expression "It's not what you say but how you say it."
3. Ask the class if they can think of examples where facial expressions and body gestures are especially important (acting, customer-salespersons encounters, and so forth). You might point out that silent movies were eagerly watched and readily understood before sound movies were developed.
4. Students will play a modified game of charades to illustrate that people can and do communicate nonverbally. This is a light, fun activity.

Guiding the Activity

5. Divide the class into teams of four or five members.
6. Students will be miming marketing and distribution products and services.
7. Team members will take turns pantomiming the products. The other members of the team will have to guess what the product is, based upon the team members's pantomime.
8. Each team member will draw the product he is to pantomime from a hat (or other suitable container).
9. The list of product and occupation cards is designed so that it can be easily cut into individual cards.
10. Rules for the game are included in the Student Instructions.

Learning More From the Activity

1. When concrete items such as products and occupations have been portrayed, ask students to make a list of emotions or attitudes (anger, affection, respect, etc.) to portray. These are the very qualities which individuals convey silently through body language and facial expressions.
2. Point out that attitudes are often conveyed silently in this way even when an individual attempts to behave in a neutral manner.
3. Ask students to convey emotions silently. Other members of the class guess which one is being portrayed.

Points to Stress

- Reiterate that we communicate with one another not only verbally but also through our facial expressions and gestures with our hands and other parts of our body.

ACTIVITY C. *Interpersonal and Communication Skills in Review*

Introducing the Activity

1. The observation exercise which follows is designed to sharpen students' understanding of interpersonal and communications skills displayed by marketing and distribution employees. Examples of excellent, acceptable and poor interpersonal skills are likely to be identified simply by observing employees on-the-job.
2. Remind the students that they have practiced these skills in the classroom and that they should note both verbal and non-verbal communications and interpersonal relations between employee and consumer, employee and employee, and employee and employer, where possible, in their observations.

Guiding the Activity

3. Organize students into small teams of 2 or 3 to visit local business establishments. Arrangements with employers should be made first. If, for any reason, a formal arrangement with employers or after-school time is not convenient for this exercise, ask students simply to observe employees during an activity of their own, such as while shopping, during lunch out

with their families or peers, etc. Opportunities abound for performing this exercise even in an informal manner.

4. Typical businesses to visit include: supermarket, department store, restaurant, gas station, clothing shop, furniture store, etc. Student teams should select the type of business and specific occupations they prefer to observe.

5. Ask students to read the Observation Guide first and to fill it in during or after their visit.

Learning More From the Activity

1. When the Guides are completed, have the class list out examples of effective and ineffective interpersonal behavior they observed. Students should explain why a particular behavior is effective or ineffective.

2. Where examples of poor interpersonal skills are given, ask students to supply a better alternative to the behavior they observed.

ACTIVITY D. *Recordkeeping and Money Management*

I. Gina's Itinerary

Introducing the Activity

1. Explain that two other skills common to most marketing and distribution occupations are developing and maintaining records, and handling and managing money.

2. Businesses which are involved in providing services directly to consumers must be certain that their records assist them in this purpose and that the system for handling money is efficient and accurate.

3. Point out that the system for handling money in a business is basically a recordkeeping system.

4. The word 'record' has many meanings. What we mean here by 'record' is a written documentation of something. Records are kept for many reasons, two of which are: to keep track of past events or to help plan future activities.

5. What kinds of records do you keep? Does anyone keep a diary? This is one type of record. Can you think of any other kinds of records that you keep? What about your school notebook?

6. Most organizations, no matter how small, keep records. Businesses, government agencies, private organizations, public organizations and industries all keep records.

7. Now we are going to look at what records are kept in business. Can you think of some things which a business would want to keep track of? (money, employee's work time, product or service it provides, prices of product(s) or service(s) it provides, and so forth). Some of the names used to identify these types of recordkeeping are:
   - inventory (goods in stock)
   - personal records (employee salaries, performance)
   - cash register receipts (sales)
   - price list
   - bookkeeping

8. Now that we have looked at why businesses keep records and what some of these records are, it is appropriate to consider how these records are kept. Most records are kept in some sort of filing system. The most common filing system is alphabetical, that is, items are kept in alphabetical order. There are other filing systems, for example, filing items in numerical order or by subject.

9. There are also many ways in which files are stored, from manual to computerized systems. A manual system is one in which the files are placed by hand in file drawers or cabinets. The files are also retrieved by hand. In some systems, the information is punched onto cards. Each hole or cluster of holes has a specific meaning. The cards are then 'read' by machine. In the most advanced systems the information is transfered to magnetic tapes. These tapes are read by computers. Magnetic tapes take the least storage space of any of the filing systems described above.

10. Small businesses might use only the simpler manual filing system. The larger the business, the more sophisticated its filing system will tend to be. Later in this unit, students will have the opportunity to visit some businesses and find out what recordkeeping or filing system they use.

11. Individual employees in marketing and distribution often keep records to help them in providing service to the consumer, and in handling and accounting for money.

12. Can you think of examples in which individual employees keep records? Consider the waiter or waitress in a restaurant. The record kept by them serves two purposes—lists the items of food ordered for communicating this to the cook and other employees involved in serving the customer and

serves as a system for recording charges to the customer and money to be collected.

Guiding the Activity

13. Explain that in this activity students will be playing the role of a sales representative for typewriters.
14. In this organization, the sales representative is responsible for:
    a. identifying potential customers
    b. meeting with potential customers to discuss their possible use of the typewriters
    c. transacting the sales between the company and customers who decide to purchase typewriters
    d. completing forms to be sent to other departments of the company to order typewriters for customer and to document the sales transaction.
15. Divide the class into small groups of 4-5 students.
16. Each group will conduct a series of activities which represent the sequence of tasks of the sales representative, Gina Wheatley.
17. Pass out Part I of the activity. Explain to the class that each small group is to develop a form which records the itinerary for Gina when visiting potential clients.
18. Explain to the class that there are two purposes for this form or record:
    (a) to help Gina—i.e., visiting firms near one another on the same day; easy identification of whom to visit next; making certain the calls can be made.
    (b) to serve as a means for Gina's manager and secretary to know of her whereabouts during each day.

Learning More From the Activity

1. Have each small group present and explain their form to the rest of the class.
2. Items of information should include:
    - name of sales representative, Gina Wheatley
    - name and address of companies to visit
    - date of expected visit
    - estimated time for visiting each client
    - time expected to be in office, lunch, etc.
    - perhaps, some indication if another visit is needed, general outcome of call, etc.
3. Reiterate the importance of such a form to the individual performing the activity and to the operation of the organization.
4. Point out the importance of the visual effect of a form—i.e., must be easy to read and understand.

II. Gina Sells

Introducing the Activity

1. Explain to the class that based upon Gina's visits to her potential clients, three companies have decided to purchase typewriters.
2. Point out that in visiting the clients Gina had to use her human relations and interpersonal skills. (She also had to know her product and how to present it.)
3. Now that the clients have decided to purchase the typewriters, Gina has to transact the purchase.
4. Explain that Gina works on commission. That is, some sales representatives receive a straight salary—e.g., $12,000—no matter how much they sell. In other cases, commissions are provided to sales representatives as an incentive to sell as many products as possible.
5. A commission is a certain percentage of the total sales amount, or profit amount. For example, a sales representative in a clothing store for lingerie may receive 5% of the total price of a piece of lingerie sold. Let's say a nightgown costs the customer $10. In this case, the sales representative receives $.50 in commission for the sale (5% of $10) of the nightgown. If the sales representative sold 10 nightgowns, the sales representative would receive $5.00 in commission ($10 x 10 nightgowns equals $100; 5% of $100 equals $5.00).
6. Sometimes the commission is based upon the profit amount. For example, suppose a sales representative for automobiles sells an automobile for $6,000, on which the profit amount is $2,000. If he/she receives a 20% commission on profit, the commission for this sale would be $400 (20% of $2,000).
7. The commission rate (percentage) offered by companies varies with the nature of the product and the structure of the organization. For example, for selling a high-volume, low cost product (such as lingerie) the sales commission will probably be lower than for selling a low-volume, high cost product (such as automobiles). Ask students why they

think the rates are generally set this way. (Answer should include that the sales representative is going to sell more of a high-volume product than a low-volume one; and to make at least as much money from a small percentage of a large sum as a larger percentage of a small sum.)

8. Also, the structure of the organization may affect the sales commission. In some organizations, the sales representative receives a salary plus commission. For example, the sales representative may receive a straight salary of $10,000 (no matter how much he/she sells) plus commission on products sold. In other organizations, the only income to the sales representative is commission–that is, he/she only receives a percentage of the sales or profit. Frequently the commission rate is higher in the latter instance.

Guiding the Activity

9. Explain that in Gina Wheatley's company the sales commission is 15% on all new typewriters and 10% on used typewriters.
10. Point out that in actual dollars the incentive is to sell more of the high-priced typewriters since 15% of $500 ($60) is more than 15% of $250 ($37.50).
11. Pass out the 3 cases in Part II.

Learning More From the Activity

1. In the case of DooLittle, the total amount of the bill is $1075:

2 typewriters at $325 = $ 650
1 typewriter at $250 = 250
1 typewriter at $175 = 175
$1075

Gina's commission is: 15% of $900 = $135.00
10% of $175 = 17.50
$152.50

2. In the second case, Greenbriar Farms, the total bill is $900:

2 typewriters at $400 = $ 800
Maintenance agreement at $200 = 200
$1000

minus the 10% discount for paying within 30 days 100
$ 900

Gina's commission is: 15% of $800 = $120.00
5% of $200 = 10.00
$130.00

3. In the third case, Larsen and Schmidt, the total bill is $72.875:

50 typewriters at $400 = $20,000
75 typewriters at $325 = 24,375
100 typewriters at $250 = 25,000
20 typewriters at $175 = 3,500
Maintenance agreement at $200 = 200
$72,875

Gina's commission is:

15% of $69,375 = $10,406.25
10% of $ 3,500 = 350.00
5% of $200 = 10.00
$10,766.25

4. Review the sales agreements from each group of students.
5. Point out that many marketing and distribution occupations involve the completion of forms and the handling of money.
6. Frequently, these activities are central to the operation and success of the business. Therefore, it is critical that the employees are both efficient and accurate.
7. Ask students how they would feel about working on commission? What are the advantages and disadvantages?
8. Point out that frequently salespersons are given quotas for selling–e.g., must sell 100 basic typewriters, 20 luxury models, and so forth, during one month.
9. Point out that maintenance agreements are common for household products as well–e.g., when you purchase a vacuum cleaner, dishwasher, and so forth.

Points to Stress

- Two skills common to many marketing and distribution occupations are the maintenance of records and the handling of money.
- It is important to the operation and success of many marketing and distribution businesses that employees are both efficient and accurate in both.

RESOURCES AND REFERENCES

Cobb, M.C. *Get That Job.* New York: Cowles Book Co., Inc. Book helps student assess qualifications and discusses role of personality in success.

"Financial Recordkeeping for Small Stores." Washington, D.C.: Small Business Administration, 1966.

Booklet describes financial recordkeeping system for small stores.

Harris, Thomas A. *I'm OK, You're OK*. New York: Avon, 1973. Practical book designed to help you feel better about yourself and others.

Hiserodt, Donald D. *Psychology and Human Relations in Marketing*. Gregg/McGraw-Hill, 1969. Text-workbook designed to help student acquire social skills and personal attributes necessary for successful marketing and distribution career.

Hoffman, Stewart, Schneider. *General Recordkeeping*. New York: Gregg/McGraw-Hill, 1971. High school textbook designed to teach students basic financial and office recordkeeping skills. Includes section on cash registers, retail sales, purchasing records and recordkeeping for small business. Workbook and teacher's manual available.

Loeb, Robert H. *Manners at Work*. New York: Association Press, 1967. Book stresses importance of attitude in order to help student apply for job and develop pleasant business relationships.

Logan, William B. and Freeman, M. Herbert. *Mathematics in Marketing*. New York: Gregg/McGraw-Hill, 1970. Text-workbook that contains mathematics exercises and problems designed to help student acquire mathematical skill necessary for entry-level marketing and distribution occupations. Includes sections on sales records, cash register and inventory procedures.

"Making Courtesy Work For You." Boston, Mass.: Teaching Systems Corporation, 1972. Programmed manual on basic courtesy in retail sales occupations.

Paolucci, B., Faiola, T. and Thompson, P. *Personal Perspectives*. New York: Webster/McGraw-Hill, 1973. Book designed for home economics classes. Includes chapters which will be helpful to student in decision-making, self-assessment and maturation.

Robertson, Jack E. *Your Attitude is Showing*. Austin, Texas: University of Texas Instructional Materials Laboratory, 1972. Teacher's reference book on common human relations problems and how to deal with them. Includes case problems. Student assignment manual also available.

Rosenberg, R. Robert. *Business Mathematics*. Gregg/McGraw-Hill, 1970. Text-workbook contains review of math fundamentals and sections on retail and credit mathematics.

Schwartz, Irving. "Personal Qualities Needed to Manage a Store." Washington, D.C.: Small Business Administration, Govt. Printing Office, 1970. Discussion of personal qualities which will help in working with employees, customers and suppliers.

PANTOMIME PRODUCTS

TELEVISION SET	BASEBALL BAT	RADIO	HAMMER
TELESCOPE	CHAIR	BED	HAT
COAT	BOAT	TENNIS RACKET	BASKETBALL
NAIL	TOWEL	CHAIR	BED
BOOK	TOOTHBRUSH	PENCIL	BICYCLE
WATCH	POTS AND PANS	FLOWERS	ICE CREAM CONE
DECK OF CARDS	POCKETBOOK	CAR	WASTEBASKET
GUM	BOOKCASE	DOORKNOB	TELEPHONE

PANTOMIME OCCUPATIONS

GAS STATION ATTENDANT	FLORIST	CASHIER-CHECKER	DOOR-TO-DOOR SALESPERSON
REAL ESTATE AGENT	BANK TELLER	TICKET SELLER	PORTER
CAR SALESPERSON	BOOK VENDOR	INSURANCE AGENT	FURNITURE SALESPERSON
HOTEL MANAGER	CLOTHING SALESPERSON	PHARMACY CLERK	BAGGER, SUPERMARKET

UNIT 12: PROBLEM-SOLVING IN MARKETING AND DISTRIBUTION

Teacher's Guide

OVERVIEW

ACTIVITIES	MATERIALS
A. *The Big Picture* Students prepare a promotional campaign for a new movie.	Case Study for each student in small groups. A supply of 8½ x 11" plain paper for each small group.
B. *Store for Rent* Students role-play a real estate agent who assists a florist in the location of an appropriate store.	Real Estate Role Description for half of the students. Florist Role Description for half of the students.
C. *Is It Worth It?* Students consider the pressures on the district manager of a supermarket chain facing a decision to change checkout equipment.	Case Student for each student in small groups.
D. *Change the Station* Students develop their buying skills as "time-buyers" in an advertising agency.	Case study and Rate Cards for each pair of students.
E. *What Do Our Customers Want?* Students develop basic research skills as they design a market research questionnaire for an airline considering a new service.	Case study for each pair of students.
F. *Which Way Do We Pay?* Students make a management decision concerning employees' salary conditions.	Case study for each pair of students.
G. *Eyewitness News* Students interview and observe individuals to determine their responsibilities and tasks.	Student Instructions and Interview Form for each student.

OBJECTIVES

- Students will be able to describe at least one occupation in each of the subclusters of Marketing and Distribution.
- Students will be able to identify some of the decisions which marketing and distribution employees must make.
- Students will be able to describe some of the decisions associated with each of the five marketing functions.

RATIONALE

Career exploration requires first-hand experience with the kinds of tasks and decisions typical of marketing and distribution occupations. This experience is obtained through various means, including written descriptions or occupational briefs; observation and interviews with employees in the real-world setting; actual work experience. An intermediate method gives students a chance to "try-on" these occupations in the school setting. In this unit students engage in a series of role-plays and case studies where they actually make decisions analogous to those made by people employed in certain marketing and distribution occupations.

A problem is provided for each of the six subcluster areas of Marketing and Distribution: Fashion Merchandise, Business and Financial Services, Food Distribution, Services for Personal Needs, Property and Home-Related Items and Transportation Services. This approach increases the student's familiarity with the industries and products of each subcluster.

The cases have been constructed to allow students to experiment with the marketing and distribution functions: selling, buying, sales promotion, market research and management. Each case has a principal character involved in tasks related to one of the marketing functions. Thus, students gain experience in both a marketing and distribution industry and a function.

Exploration of marketing and distribution occupations requires a systematic look at both industries and functions; Since the activities depict only a small number of the myriad marketing and distribution occupations, it is important to relate each occupation role-played to other marketing and distribution occupations within that subcluster and within that function in all industries.

To expand the investigation of occupations beyond these exercises, students interview and observe individuals employed in marketing and distribution occupations. For the interview and observation, students gain additional familiarity with the responsibilities and daily tasks of marketing and distribution occupations and do so in the real-world setting. They have an opportunity to observe the actual work environment in which an occupation is performed. Upon completion of the interviews, students describe the occupation of the individual interviewed. Thus the entire class is able to benefit from each class member's experience and to find out about a greater number of occupations.

CONCEPTS

- Marketing and distribution occupations involve making decisions. The particular decisions depend upon the industry, the marketing function, the individual firm and the level of responsibility of the individual.
- Decision-making cases provide students with the opportunity to become familiar with some of the decisions which confront a variety of marketing and distribution employees.
- Typical decision issues can be described for each marketing function.
- Sales promotion decisions center on determining the target audience, selecting appropriate media for the audience, creating the promotional material including visual merchandising (displays in stores).
- Selling decisions center on determining the needs of the consumer, assessing the suitability of products and services for consumer needs, stressing the advantages of a product or service, assisting the consumer to make a decision.
- Management decisions are varied, involving the setting of policy on prices, personnel, goods and services offered. Management decisions require assessing the consequences of decisions on sales, staff compensation and morale, profit, efficiency, consumer satisfaction.
- Buying decisions involve evaluating the quality of products and services the business purchases, the suitability of product lines for the market, the capabilities of the vendor (seller) to deliver goods and services on time, in sufficient quantity, and at an acceptable price.
- Market research decisions require selecting and designing methods of determining consumer preferences and reactions to products and services offered by the business. Information through market research supports the decisions made in all other aspects of marketing.

ACTIVITY A. *The Big Picture*

Introducing the Activity

1. Explain to the students that the person who prepares a promotional campaign in the theatre industry is called a Film Promotion Director.
2. Explain to students that this person is employed in an industry which serves the personal needs of the consumer for entertainment.
3. Explain to students that the Film Promotion Director is involved in sales promotion activities—support activities which will increase sales. In this case the sales to be increased are the sale of movie tickets.
4. Ask students if they can remember any of the advertisements for recent movies.
5. Explain to students that during this activity they will be creating a sales promotion campaign for a new movie.

Guiding the Activity

6. Divide the class into groups of three to four students.
7. Distribute the Case Study for The Big Picture. (This provides a description of the responsibilities of Estella Lewis, the Promotion Director for Commonwealth Pictures. It also provides a description of Estella's current project—preparing a sales promotion campaign for a movie called "Crazy Car.")
8. Review the Case Study with the students. It may be necessary to give students an example of an advertising slogan—"You deserve a break today". Students may also need assistance in thinking of special promotional activities.
9. Once each group understands its assignment, circulate among the groups, assisting the students with ideas for the sales promotion campaign. Provide each group with a supply of 8½ x 11 plain paper. Students may wish to bring in newspapers and magazines to assist in the preparation of advertisements.
10. Allow each group approximately two class periods to complete its promotional campaigns.
11. Once each group has finished developing its campaign, select a representative of each group to explain the group's campaign to the rest of the class.

Learning More From the Activity

1. Ask students to choose the promotional campaign which they feel would be the most successful in attracting customers into the theatres. Have students enumerate the characteristics of the promotional campaign they like the best.
2. Explain to students that similar campaigns are conducted for virtually all products. For example, many companies use advertisements, billboards and radio and T.V. spots.
3. Ask students to identify slogans or promotional aspects for products they are familiar with, such as toothpaste, automobiles, insurance. Have students discuss why they think these promotional activities attract customers.
4. Refer students to the cluster diagram for the subcluster *Services for Personal Needs*. Ask students to enumerate similar positions in other industries.
5. Explain to students that the occupations grouped in this subcluster generally provide services to the consumer rather than products which relate to enjoyment, appearance and personal care.
6. Explain to students that sales promotion activities are usually a chance to be creative, requiring thinking of new ideas and using artistic talents.

Points To Stress

- Similar promotional activities are conducted for most products and services.
- Occupations in this subcluster generally serve personal needs of the consumer.
- Sales promotion occupations can be creative.
- Sales promotion involves publicizing the availability and the positive features of a product or service to attract consumers to purchase it.

Performance Criteria

Students should be able to identify promotional methods: advertisements, posters, billboards, etc.

Students should be able to identify sales promotional positions in four industries.

ACTIVITY B. *Store for Rent*

Introducing the Activity

1. Explain to students that the person who assists customers in the purchase and rental of property such

as homes, apartments and buildings is called a Real Estate Agent or Salesperson.

2. Explain to students that this person is employed in the subcluster entitled Property and Home-Related Items.

3. Explain to students that the Real Estate Agent is involved in sales activities–activities which tell the consumer what is available and help the customer make a decision to buy or not to buy. In this role-play the decision centers on whether a customer chooses a certain store to rent. Real Estate sales frequently involve more than one visit to a property before a decision is reached by the customer.

4. Explain to students that this type of selling involves personal contact with the consumer and familiarity with properties and their advantages and disadvantages.

5. In addition, most states require that Real Estate Agents obtain a license.

6. Explain to students that during this activity half of the students will play the role of a Real Estate Agent and the other half will play the role of a Real Estate Agent's customer. The customer in this case is a florist who is looking for a store to rent.

Guiding the Activity

7. Divide the class into pairs.

8. Have students decide which partner wants to play the role of the Reat Estate Agent and which student wants to play the role of the florist who is looking for a store to rent.

9. Distribute the Real Estate Agent profile description and the Store Rental Listings to students playing that role. Distribute the customer role description to the students playing the role of the florist.

10. Allow students approximately five minutes to review their materials.

11. Once each pair understands their roles, students can begin their dialogues. The teacher should circulate among the groups.

12. Remind students that the decision required is not which property to rent, but rather which properties the customer would like to go to see.

13. Once each pair has completed the dialogues, choose one pair to conduct their discussion again, in front of the entire class.

Learning More From the Activity

1. Review each of the properties listed with the agent. Have students discuss *why* or *why not* they thought that property was an appropriate one to investigate further.

2. Explain to students that selling provides the consumer with the information necessary to make decisions. Ask students to enumerate what the customer has learned from consulting a Real Estate Agent.

3. Explain to students that selling positions exist in all of the industries in Marketing and Distribution. Ask students to consider how selling differs in different industries, such as the apparel or hardware industry; e.g., how often does a person go back to consider the same item in a clothing shop? Where is business conducted?

4. Refer students to the cluster diagram for the Property and Home Related Items Subcluster. Ask students to enumerate similar positions in industries listed.

Points To Stress

- Selling occupations exist in each of the industries which are part of Marketing and Distribution.
- Selling provides the consumer with valuable information.
- Selling involves stressing the positive features of a product or service.
- Selling involves assisting the customer in making a decision.

Performance Criteria

Students should provide reasons for the appropriateness of each piece of property listed.

Students should list the kinds of information available from a real estate agent.

They should also list similar positions in selling in other industries.

ACTIVITY C. *Is It Worth It?*

Introducing the Activity

1. Explain to students that the person who is in charge of a group of stores, as in this case involving supermarkets, is called the District Manager.

2. Explain to students that the Supermarket District Manager is employed in the food distribution industry.

3. Explain to students that the Supermarket District Manager makes decisions about the stores, the equipment, personnel, and so forth.
4. Tell students that during this activity they will be making a decision similar to those made by Supermarket District Managers.

Guiding the Activity

5. Divide the class into small groups of 3-4 students.
6. Distribute the case of Steve Edwards, Save-Well Supermarkets.
7. Review the role description with students.
8. Have each group discuss the pros and cons of adopting the new check-out system.
9. Instruct the groups to decide whether or not to adopt the new system.
10. Explain to students that they are now going to advise Edwards.
11. Explain to students that they should explain to Steve Edwards the views of a consumer group, the union representatives, and the supermarket managers.
12. You can have two students play each of these roles. Have Steve explain the new system. Have each group discuss its attitude toward the installation of this system.

Learning More from the Activity

1. Explain to students that management decisions may involve disagreement. It is difficult to please everyone. Management must weigh the pros and cons of situations.
2. If possible, arrange for a representative of a cash register manufacturer to speak with the students about the "scanner-type" cash registers.
3. Refer students to the cluster diagram for the Food Distribution subcluster. Ask students to enumerate similar positions in other industries.

Points To Stress

- Management must weigh the positive and negative effects of decisions.
- Management attempts to get as much information as possible before making a decision.

Performance Criteria

Students can articulate the positions of each group--managers, consumers, and unions.

Student can identify managerial positions in 3 other industries.

ACTIVITY D. *Change The Station*

Introducing the Activity

1. Ask students to name television programs which probably have a large audience of teenagers.
2. Ask students to identify local radio stations that are primarily for adults.
3. Explain to students that the advertisements on radio and TV shows are carefully placed--to match up potential customers for the product with the audience for the show. For example, there are many candy bar and breakfast cereal advertisements on the Saturday morning cartoons for young children.
4. Explain to students that the person who places ads on TV and radio and in magazines is called a Media Buyer. This person generally works for an advertising agency. Media buyers buy time from radio and TV and space from magazines and newspapers.
5. Explain to students that Media Buyers provide business services.
6. Explain to students that the Media Buyer must consider the best media to reach his/her audience; e.g., young children do not read, so magazines are inappropriate.
7. The Media Buyer also must consider the relative cost of different media; e.g., TV is much more expensive than most magazines.

Guiding the Activity

8. Divide the class into pairs.
9. Explain to students that they will be buying time for commercials for a motorcycle dealer.
10. Ask students to identify who the potential customers of a motorcycle dealer may be.
11. Distribute the case study of Ben Richmond, Media Buyer.
12. Allow students approximately five minutes to review the case study.
13. Distribute the Rate Cards to students.
14. Have each pair decide when and on what station they will be buying time.
15. Once each group has made their decisions, review the decisions made by the groups. Have students give the reasons for selecting certain times and stations.

Learning More from the Activity

1. Ask students to describe where they would have bought time if they were representing a company that made denture adhesives.
2. Explain to students that people involved in media buying are trying to reach the target market for their products.
3. Refer students to the cluster diagram for the *Business and Financial Services* subcluster. Ask students to enumerate and describe similar positions in other industries.
4. Ask students to identify how media buying may differ from other types of buying, such as clothes buying or equipment buying. Explain that there is still a basic similarity since the buyer is trying to select what is most appropriate for the client's needs.

Points to Stress

- Buying occupations exist in each of the industries in marketing and distribution.
- Buying, in all industries, involves selecting what is appropriate for the needs of the client.

Performance Criteria

Students provide reasons for the time selections they made.

Students identify 3 buying positions in other industries.

ACTIVITY E. *What Do Our Customers Want?*

Introducing the Activity

1. Explain to students that the person who does research on the preferences and characteristics of the consumer is called a Market Research Analyst.
2. Explain to students that these people are employed in virtually all industries, studying consumer's habits relating to car buying, TV watching, grocery shopping, and so forth.
3. Explain to students that researchers provide information for making marketing decisions, such as whether to introduce a new product, or how a new product should be packaged.
4. Ask students if they have ever been in a shopping center where a survey was being conducted. Or have they ever been in a hotel where a questionnaire about service was left?
5. Explain to students that during this activity they will be preparing a questionnaire for an airline which is considering offering a new service: reduced fare for no food in-flight.

Guiding the Activity

6. Divide the class into groups of three to four students.
7. Distribute the case study of Hector Jones.
8. Review the case study with the students.
9. Allow students one to two class periods to construct the questionnaire.

Learning More from the Activity

1. Choose a representative from each group to read the group's questionnaire to the class. Have other class members evaluate whether the questionnaire is clear and whether it will get the kind of information necessary to make decisions.
2. Explain to students that frequently marketing research is used in advertising campaigns. For example, "Four out of five doctors recommend. . . ."
3. Ask students to identify other advertising campaigns that refer to consumer preferences based on research.
4. Ask students to describe how the answers to the questionnaires would be tabulated.
5. Refer students to the cluster diagram for the Transportation Services subcluster. Ask students to list other kinds of market research issues which might relate to the industries in this subcluster.

Points To Stress

- Market Research activities provide information on consumer preferences for decision-making.
- Tools of market research, such as questionnaires, must be clear and easy to understand in order to get the desired information.

Performance Criteria

Students develop a questionnaire of ten questions which is sensitive to type of consumer, explains the new plan, and elicits a response concerning the consumer's preferences.

Students identify market research issues for 2 other industries in this subcluster.

ACTIVITY F. *Which Way Do We Pay?*

Introducing the Activity

1. Explain to students that the manager of a fashion

distributor is concerned with buying from manufacturers and selling to retailers.

2. Explain to students that this person is employed in the Fashion Merchandise subcluster.
3. Explain to students that during this activity they will be deciding on a new type of compensation (method of payment) for sales representatives of a fashion distributor.

Guiding the Activity

4. Divide the class into pairs.
5. Distribute the case study for House of Francine to students.
6. Review the case study with students.
7. Have each pair discuss the positive and negative aspects of the two compensation plans. Under which plan would they rather be paid?
8. Lead a class discussion based upon the pros and cons of each plan.
9. After students have discussed the case choose two volunteers to play the role of Francine and a sales representative. The person playing the role of Francine should present the plan to the sales representative. The sales representative should discuss his/her reaction to the plan.

Learning More from the Activity

1. Provide students with information on other compensation plans, such as salary plus commission, salary plus bonuses, etc.
2. Explain to students that management must consider the pros and cons of each decision in terms of costs to the company, incentives for satisfaction of the staff, etc.
3. Evaluating decisions is a continual process, since management must observe the effects of a decision after it is made to determine whether to change or keep a new policy.
4. Refer students to the cluster diagram for the Fashion Merchandise subcluster. Ask students to list similar positions in other industries.

Points To Stress

- Management must consider the pros and cons of decisions.
- Management tries to continually re-assess the impact of its decisions on various aspects of the business, such as sales, staff morale, staff performance, costs, profits, etc.

Performance Criteria

Students can define:

salary
commission
salary plus commission
salary plus bonuses

and list advantages and disadvantages of each for employer and employees.

Students list similar managerial positions in 3 other industries.

ACTIVITY G. *Eyewitness News*

Introducing the Activity

1. Explain to students that they have had an opportunity to practice some of the skills necessary for certain occupations.
2. Now they will have an opportunity to find out more about occupations which interest them.
3. Ask students to identify occupations which interest them. (If necessary, consult and discuss the cluster diagram.)
4. Stress the importance of exploring occupations in their real-world settings, and of talking to people employed in occupations of interest.

Guiding the Activity

5. Distribute the student instructions and interviews form to students. You will need to make contacts in the community for student visits.
6. Allow approximately three days for all students to complete interviews of employees in Marketing and Distribution.

Learning More from the Activity

1. Once each student has completed an interview, have students report on the occupations they have studied.
2. Have students list out the marketing functions performed by the people they have interviewed.
3. Ask students to decide which of the people they interviewed had management responsibilities.
4. Ask students to identify differences and similarities of the jobs held by the people they interviewed.
5. Ask students to list what the people they talked to liked about their jobs.

Points To Stress

- The same occupations involve different tasks and responsibilities in different businesses.
- Talking to people already engaged in fields that interest a person is a good way of finding out more about the field and a help in decision-making.

Performance Criteria

Each student lists the positive aspcts of the job held by their interviewees.

Students list the marketing functions, special tasks, and managerial status of the interviewees.

RESOURCES AND REFERENCES

Belanger, Laurene L. (consultant) *Occupational Exploration Kit*. Science Research Associates, 259 East Erie Street, Chicago, Illinois. Set of 400 illustrated occupational briefs and bookets describing careers. *Occuscan* device enables student to identify occupations based on student's achievement and objectives.

Bikkie, James. *Careers in Marketing*. New York: McGraw-Hill, 1971. Student manual that assists students in exploration of marketing careers in apparel, home furnishings, automotive, hardware and marketing services industries.

Bratton, Otis L. and Tomlinson, Robert A. *Cabbages to Kings and Various Things*. Glendale, California: Bowmar, 1970. Set of filmstrip-cassettes that examines five marketing careers.

Career Information Unit for Distributive Education Student Handbook. Columbus, Ohio: Distributive Education Materials Laboratory, 1973. Series of student activities in each marketing taxonomy subclassification that enable student to explore various marketing careers. Teacher Handbook available.

"Career World". Curriculum Innovations, Inc., 501 Lake Forest Avenue, Highwood, Illinois, Mid-April, 1974. Magazine that examines different careers each month. Includes interviews and sources for further investigation.

Chronicle Guidance Occupation Briefs. Chronical Guidance Publications, Moravia, New York. Sets of four-page briefs on occupations.

Costello, J. and Wolfson, R. (Eds.). *Concise Handbook of Occupations*. Chicago: Ferguson Publishing Co., 1970. Description of 300 jobs including educational requirements and employment trends.

Dorr, Richert, Meyer and Haines. *Buying and Pricing*. New York: Gregg/McGraw-Hill, 1971. Text-workbook designed to familiarize beginning marketing worker with buying and pricing functions. Includes information on buying careers.

Grandfield, Raymond and Gold, Faye. *Working for a Wholesaler*. New York: Fairchild Publications, 1971. Text-workbook designed to help student develop attitudes, knowledges and skills required for wholesaling careers.

Hopke, William E. (Ed.). *Encyclopedia of Career and Vocational Guidance*, Vols. I and II. Chicago: Ferguson, 1972. First volume includes 71 articles describing major career fields. Volume 2 contains specific facts about over 650 occupations.

Murphy, James M. (Comp.). *Handbook of Job Facts*. Chicago: Science Research Associates, 1972. Concise summaries of basic information on over 200 major occupations.

Occupational Outlook Handbook. Washington, D.C., 20402: Superintendent of Documents, 1974-75. Comprehensive source of career information for over 700 occupations. Provides information on nature of work, employment outlook, training requirements, etc.

Orent, Norman B. *Your Future in Marketing*. New York: Richards Rosen Press, 1966. (158 pp.) View of wide scope of career opportunities and challenges in field of marketing.

Platten, John H. *Opportunities in Marketing Research*. New York: Vocational Guidance Manuals, 1966. Book describes types of marketing research and job opportunities. Includes sections on educational and training requirements.

Wesley, Caldwell and Porter, Henry. *Selling: A Good Way to Earn a Living*. Olcott Forward, Pleasantville, New York, 1971. Cassette-filmstrip set describes realistic entry level sales jobs. Includes role-playing activities and section on how to apply for a job.

Wiggs, Garland, D. (Ed.). *Marketing, Business and Office Specialists*. Chicago: Ferguson, 1970. (342 pp.) Career information on over 300 business-related careers.

"Your Career in Wholesale Distribution". National Association of Wholesaler-Distributors, 1725 K Street, N.W., Washington, D.C. 20006. Booklet describes functions performed by wholesalers and career opportunities in wholesale distribution industry.

UNIT 13: COMMUNITY EXPLORATION PRODUCTS

Teacher's Guide

OVERVIEW

ACTIVITIES	MATERIALS
A. *It's That Time of Year* Students plan and put up displays.	
B. *Comparison Shopping* Students compare pricing strategies in three marketing and distribution industries.	Sample Form for Comparison Shopping
C. *Conducting a Survey* Students get experience in marketing research, interview techniques, designing interview forms, and analyzing data.	Sample Interview Instrument
D. *Starting a Business* Students plan and implement a plan for starting a school-based business.	Student Instructions
E. *Distributive Education Clubs of America* Students learn about D.E.C.A.	Information Sheet

OBJECTIVES

- Students will gain experience in community exploration.
- Students will be able to plan and put up a window display.
- Students will be able to describe different pricing strategies for various consumer items.
- Students will be able to conduct a simple market survey using marketing research, interview, designing and analytical techniques.
- Students will be able to identify and implement steps required in planning, organizing, and operating a student-run business.
- Students will be aware of Distributive Education Club of America activities.
- Students will be able to show interpersonal skills (e.g. in interviewing situations) and behaviors (e.g. courtesy and dress) in community interactions.

RATIONALE

The principal objective of this unit is to provide opportunities for community exploration activities for students. The projects described here, although presented as a separate unit, are meant to be integrated into the curriculum wherever the teacher feels that such a community-oriented activity would be valuable in satisfying career and adolescent development needs. Many similar activities, in fact, appear throughout the units.

The unit is presented separately for several reasons:

- Implementation of these activities typically requires special advance arrangements since they are all community-based.
- In several cases, the content for the activities must be researched by the students and is not provided in the curriculum by the teacher.
- In some school settings, the types of activity suggested here might be undertaken as an ongoing project, to be completed in a month's time or even longer.
- More extensive involvement by school administrative officials may be required for some activities.

CONCEPTS

- Career development requires exploration of the community as well as classroom learning.
- Career development relies on interaction with people who actually work in the occupations in which students are interested.
- Concepts of courtesy, dress, responsibility must be dealt with in the adult world of work.
- Interpersonal skills are developed with practice. The opportunity to interview and/or to observe employers, employees, and consumers in the community provides practice in an out-of-class setting.
- Research skills are important for students to learn "how to find out". These skills are transferable to many other human endeavors.
- Presenting and promoting one's product or service is an important element of all marketing and distribution jobs. Preparing displays in a store window or elsewhere is used as an example.
- Comparison shopping is both an important consumer skill and an important market research activity. The more alert the consumer is to different prices for the same product, the more effective and economical a shopper she/he is. Students interested in the marketing and distribution field should be cognizant of pricing strategies.

Guidelines For Implementing Community Exploration

In considering the activities presented in this unit the teacher should be aware of some of the planning that community-based activities sometimes require. Students may need intensive preparation for encountering the adult world of work in matters of courtesy, dress, responsibility, and so forth. Employers may be concerned about students appearing in their establishments. Schools and/or students may be located in rural areas where it is difficult for students to locate and reach employers. Schools may also be reluctant to authorize students to go into the community for study purposes. These types of concerns may be addressed through planning and compromise.

The models for implementing community exploration which follow may be helpful in making adjustments to the above considerations. They reflect experiences of teachers in a variety of school settings and communities.

A. *Individualized Exploration*

- Focus on small group interviews and experiences, by teaming students in pairs or threes.
- Target for after-school or before-school field work conducted by students independently to enhance the learning potential of the experience.
- Plan for field work by contacting community businesses for acceptance and cooperation.

- Utilize organized groups of employers (e.g., trade associations, Chamber of Commerce) to reduce number of contacts that must be made and time spent in making them.

- Enlist support of guidance personnel, parents, others who may assist in securing the support of businesspersons and in the making of arrangements.

- Prepare students to make appointments.

- Train students in suitable behaviors in the field, in interviewing and observing skills, and the purpose of each specific field experience.

- Follow-up student experiences with in-class analysis and discussion.

- Have students follow-up business contacts with 'thank you' notes.

B. *Parent-Assisted Exploration*

If parents, school administrators, or businesspersons are concerned about unsupervised adolescents appearing in business establishments, supervision may be supplied while maintaining the 2-3 student team.

- Arrange for a parent or student teacher to accompany students on released time or before or after school. They can furnish supervision and provide transportation, which is sometimes necessary.

C. *Informal Exploration*

Small group experiences may not be feasible in a given community, because the school, parents or employers disapprove it. An alternative is to:

- Assign students a single field experience over a period of a month to perform on their own time as opportunity arises.

This approach, while not ideal, permits students direct interaction without flooding the community with students over a short-time period. It attempts to capitalize on students engaging a receptive employee in the course of his or her normal activities. In marketing and distribution, many opportunities exist for this interaction to occur.

D. *Field Trips*

- Conduct a class field trip.

This alternative may not offer the advantage of direct student interaction on a personal basis with adult workers if treated in the conventional way as an observational experience for the class as a whole.

A more effective possibility is arranging with an employment center such as a large shopping center to set aside time during a day for students to visit with employees and managers. Students may be dispersed in this plan to meet on one-to-one bases while under the supervision of the teacher and any assisting adults (parents, aides). Businesspersons may be more receptive to this arrangement if formal supervision is present.

E. *Bringing Businesspersons To School*

If field experiences prove impossible, bring businesspersons into the school. This alternative can approximate the field experience most closely if:

- Businesspeople are brought in to meet with students on a small group basis. This requires a large number of businesspeople rather than a single guest lecturer.

- School facilities (e.g., auditorium, cafeteria) are used to position businesspeople to receive 1-3 students to interview them.

- Businesspeople are selected to represent the full range of marketing and distribution careers and/or of expressed student interests in selected aspects of the field.

The formal preparation of students as well as the arrangements with businesses which must be made in this model approximate those in the first, ***Individualized Exploration***.

ACTIVITY A. *It's That Time of Year*

Introducing the Activity

1. In this activity, students prepare displays, either at the school or in the window of a local store. This project is designed to provide students with experience in planning and putting up displays and in utilizing the special materials in display.
2. The teacher should attempt to arrange for a display manager for a local store to speak with the students. This could be accomplished at the store or inside the classroom. The former is preferable. Then the students can begin their own display project.

Guiding the Activity

3. A local business may provide the opportunity for students to set up a display in the store's window. The teacher should contact local businesses to see if that would be feasible. Some businesses would welcome the opportunity of having a small group of students put up a display. If several businesses are interested, an opportunity for the entire class could

be provided. The store manager or display person can assist the students in using props and signs.

4. There may be display cases or large windows within the school building. Speak with school administrators about the possibility of students in your class using the display windows. An effort should be made to obtain invisible wire, mannequins, props, etc., from local stores no longer using them. During the course of the school year, different student groups should be responsible for preparing the display window to publicize school events, seasons, holidays, and so forth.

ACTIVITY B. *Comparison Shopping*

To get ready for the activity, the teacher should contact the managers of local clothing stores, food stores and service stations. The teacher should explain that the students are studying marketing and distribution occupations and that they will be doing comparative shopping for the purpose of learning more about the field of marketing and distribution.

Introducing the Activity

1. In this activity, students will conduct a survey of the prices of items in different stores. At the conclusion of the activity, students will be able to compare and contrast the pricing strategies of various food, clothing and automotive items.

Guiding the Activity

2. Divide the class into three groups; one for food items, one for clothing and related items, and one for automotive services.
3. Each group should develop a list of products which are carried by at least three outlets. The list should include as much descriptive information as possible. Private food and clothing brands should not be used since these are unique to the store. It may be necessary for students to do some of the research at home for developing the list. In this way, they can get the correct brand names, sizes, and so forth. Samples of items which could be on the lists are provided below:

Food Items	*Clothing and Related Items*	*Automotive Services*
1 qt. skim milk	1 pr. cotton socks (brand)	1 gal. regular gas
1 7 oz. shampoo (brand)	1 cotton & polyester Levi's for Gals blue blouse	1 gal. no-lead gas
1 lb. lean hamburger	1 4 oz. size of cologue (brand)	1 tune-up on eight cylinder car
1 30 oz. box cereal (brand)		1 qt. 10-40 oil

4. Once the students have developed a list of 10-15 items, review these lists to make sure that there are no ambiguities and that comparison can be done easily. Be sure that the lists have a place to record prices, the name of the "shopper", the name of the store or service station, and the date visited.
5. Duplicate copies of the shopping list for each group. Choose one day or week-end when the shopping visits will take place. Students may go in pairs or threes to conduct the visits.

Learning More From the Activity

1. Once students have completed the shopping visits, have them make a comparison chart of the different prices for the same items.
2. Ask students why the prices differ. Ask students whether price differences have any relation to services offered, location, prestige, income level of a store's consumers, and so forth.

ACTIVITY C. *Conducting a Survey*

Introducing the Activity

1. This activity provides students with experience and basic skills used in conducting a marketing research study.
2. Solicit possible reasons for carrying out market research, e.g.,
   - new product development
   - sales improvement
   - advertising improvement
   - consumer identification
3. Review interview techniques with class if necessary.
4. Discuss factors in designing a research instrument, e.g.,
   - setting objectives of research
   - deciding technique of research—questionnaire, face-to-face interview, telephone
   - choosing relevant questions

Guiding the Activity

5. Divide class into groups of 4-5 students.
6. Have each group select a topic to research from list of suggested topics:
   - Do consumers associate the slogan "We're Number 1" with a car rental operation?

- Can consumers identify a particular brand of cola by its taste?
- What characteristics attract consumers to a particular supermarket?
- Would the students shop at a school bookstore?
- Does a product's display position affect consumer's buying habits?

7. Each group develops objectives of its research and interview instrument.
8. Students design an interview form to meet the objectives of their survey. A sample form is included in these materials.
9. Students should develop a methodology for selecting a sample population. They can randomly select names from telephone books, visit offices, knock on doors, etc. Their methodology should include the issues to be researched and the number of interviews they plan to conduct.
10. Students then conduct interviews or perform observations. About two weeks should be allotted for this task.
11. Each group analyses its data and prepares a report on its findings.
12. In class, each group should present its report. Presentations should include:
    - methodology
    - problems incurred
    - findings
    - implications of findings–i.e., how might the information be utilized by marketing manager.

Learning More From the Activity

1. Review ways this information can be used–e.g., new product development, ongoing products; improving advertising; sales.
2. Discuss the effect of various interview techniques–e.g., face-to-face vs. telephone.
3. Discuss the effect of various features of the instrument–were all questions relevant? Was the interview too long?
4. Analyze data–questions, answers, research issues.
5. Discuss whether the sample population was representative.
6. Describe additional skills and training necessary for occupations in this field–e.g., statistics, research methodologies.

ACTIVITY D. *Starting A Business*

Introducing the Activity

1. Consider assisting students with starting their own school-based, classroom business.
2. Ask students for suggestions about what kinds of products or services are needed in their school. They might consider the various needs of different markets: teachers, students, parents, visitors, etc.
3. Discuss the resources in the class. Some class members may have special skills, experience, community contacts, or experience. Are they available for work after school or on weekends?
4. Does the school have any special features which might be utilized: a gym, an evening school, theatre, small bus, etc.

Guiding the Activity

5. Once the class has decided on a project, encourage them to use the checklist included in student materials and to make the decisions and arrangements themselves.
6. Emphasize the importance of planning.
7. Call in a business expert to advise and assist.

Learning More From the Activity

1. This activity is open-ended. Its scope, length and characteristics will depend upon the class and school situation. Whether students are running a one-night concession at a dance or a semester-long student service bureau, remind them that they are using the concepts of marketing and distribution–market, supply and demand, profit, entrepreneurship, etc.–and also the planning skills which have been emphasized elsewhere in this curriculum.
2. Consult Distributive Education teachers in your school who may have suggestions, cautions, etc., for your students.

Points to Stress

- Opportunities for entrepreneurship exist everywhere. Careful consideration of the market and some imagination will uncover them.
- Systematic planning in starting a business minimizes the chance of failure.

Performance Criteria

In planning their business, students consider the following elements of the checklist: market, use of profits, location, obtaining capital, equipment and merchandise, advertising, staffing and recordkeeping.

ACTIVITY E. *Distributive Education Clubs of America*

Student-Directed Experiences: DECA and Its Activities

Youth organizations have proven to be extremely successful vehicles for teaching students business skills. The youth organization associated with the field of marketing and distribution is DECA, the Distributive Education Clubs of America. For students enrolled in the Distributive Education curriculum, DECA is an integral part of the instructional program. Its program of youth activities includes awards and scholarships, career development conferences, leadership training and educational projects.

Background of DECA

DECA is a non-profit, school-centered, self-supporting organization which is designed to develop future leaders for marketing and distribution. DECA is organized on the local, state, and national levels. At the local level, Distributive Education students form a Chapter of DECA and elect their own student officers. Nearly all Chapters are self-supporting with members paying local, state and national dues. The Distributive Education teacher-coordinator serves as the Chapter Advisor.

All Chapters within a state are chartered by and comprise a State Association of DECA. Each State Association elects student officers from its membership. National DECA is composed of State Associations. Student delegates elected or appointed by each state elect National Officers.

National DECA is made up of five divisions. The three student divisions are High School, Junior Collegiate and Collegiate. DECA's two adult divisions are an Alumni Division, composed of former Distributive Education students at all levels, and a Professional Division, composed of teacher-coordinators, teacher-educators, Distributive Education Supervisors, and administrators, supporting businesspersons and interested parents.

The competitive events program of DECA, an outgrowth of the instructional program, provides learning experiences as well as awards and recognition. In many of these events students work with businesspersons in preparation for competition. Examples of the current competitive events for the High School Division are:

- *Public Speaking*, which is offered to promote the development of the student's ability to arrange, organize and present information relative to distribution in an effective manner.
- *Area of Distribution Manual*, which is designed to give experience in research, selection and organization of information on an area or phase of distribution (e.g., credit, advertising, fashion).
- *Advertising*, which is offered to develop student's ability and skill in writing copy and planning layout for a newspaper ad.
- *Sales Demonstration*, which is designed to enable the student to use his knowledge of good selling by performing a sales demonstration.

One of the major activities of DECA is the Merits Awards Program (MAP). The program, a competency-based approach to career exploration and preparation in marketing and distribution, is based on individual student achievement accompanied with an awards program for student recognition. MAP activities correspond to the competencies needed in distributive employment and progress in complexity from Bronze level to Silver level to Gold level. Within each grouping the student must demonstrate her/his knowledge of economic understanding, product and/or service knowledge, communications, human and public relations, and marketing.

Within each major grouping, students select a designated number of activities to demonstrate their understanding of each of the five areas stated above. These activities include interviewing businesspersons, making a speech, presenting an advertisement, conducting a survey, etc. For example, each of the three activities below is designed for students to demonstrate an understanding of marketing. The examples are selected from each of the three competency levels.

Bronze:	List 5 facts about a product you sell or would like to sell and tell how a customer would benefit from each fact.
Silver:	Make a survey as to why customers reponded to a sale: e.g., flyer, advertisement, just happened to be there, display, etc.
Gold:	Develop a 6-month sales promotion program, including cost of two 15-second T.V. commercials and a one-quarter page ad in the local newspaper.

Strategies for Using DECA

Three basic strategies may be employed for expanding student learning experiences through DECA: 1) explore the possibility of junior high school students joining the local DECA chapter, 2) use DECA as a model for establishing a similar organization for your students, and/or 3) bring high school, junior college, or college DECA members into the classroom to share their activities with your younger students.

1. *Exploring DECA Membership*

   Under the bylaws of National DECA, only students enrolled in Distributive Education are eligible for active membership in DECA. However, a State Association or a local Chapter may make provision for associate membership. This strategy of DECA membership offers great potential for expanding opportunities for student career exploration. In addition, it can provide opportunities for sales projects, social activities, and community activities.

2. *Using DECA as a Model*

   Another strategy you could employ is to organize a club similar to a DECA Chapter, but specifically for junior high school students. The advantage of this strategy is that the experiences may be provided even where membership in an existing Chapter is not available. Write to DECA for more information.* This information, including DECA bylaws, suggestions for Chapter organization, Chapter activities, etc., can serve as a guide and model for establishing a similar organization.

3. *Bringing in Older Students*

   Especially if the two previous strategies are infeasible, but valuable in itself, the strategy of bringing in older students should be implemented.

   You should ask high school students to share with your students the details of their activities. That is, if the student conducted a Studies in Marketing project, she/he should explain:

   - why she/he decided to do this project
   - how she/he designed the survey
   - how he/she conducted the survey (how many people were contacted, and so forth)
   - what the results were
   - how she/he analyzed the results, if this was done
   - the personal rewards she/he realized

For purposes of this unit and the entire curriculum, substitutes will not be as effective as actual student experience.

RESOURCES AND REFERENCES

Distributive Education Clubs of America. *Chapter Management Aids Handbook*. 200 Park Ave., Falls Church, Virginia, 22046.

Distributive Education Clubs of America. *MAP for DECA*. Falls Church, 1972.

Distributive Education Clubs of America. *What It Is What It Does*. Falls Church.

Distributive Education Clubs of America. *Official Handbook*. Falls Church, 1975.

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*DECA, 200 Park Ave., Falls Church, Virginia 22046.

UNIT 14: HOW TO START ONE'S OWN BUSINESS

Teacher's Guide

OVERVIEW

ACTIVITIES	**MATERIALS**
A. *Review of Entrepreneurship*	
Students re-examine some of the advantages and disadvantages of entrepreneurship in class discussion.	
B. *Identifying the Market*	
I. *Cora's Dress Shop*. Students identify generic characteristics of a market in a case study.	Case Study for each student
II. *See the Light*. Students analyze degree to which an entrepreneur appropriately investigated the market in a case study.	Case Study for each student
C. *Financing a Business*	
Students identify typical expenses and capital requirements for financing a business, and funding sources for doing so.	Student Information Sheet; Interview Form for each student.
D. *Making Financial Projections*	
Students make financial projections.	Case studies for each student
E. *Organizing a Business*	
I. *Organization Chart*. Students match staff with functions.	Student Instructions. Description of company, plus Organizational Chart, and Job Descriptions for each student.
II. *Organizing for Work*. Students identify tasks and functions and develop a plan in case study exercise.	Student Instructions and Case Study for each student.
F. *Promoting a Business*	
Students develop their own advertising campaign, deciding on media, audience, and so forth.	Student Instructions and Case Study for each student.
G. *Business Planning in Review: Will Joe Make It?*	
Students analyze a fictitious new business to assess its quality of planning.	Student Instructions, list of questions and Community Description for each student.

OBJECTIVES

- Students will be able to identify the decisions required in planning a business.
- Students will be able to describe the relative advantages and disadvantage of entrepreneurship.
- Students will be able to identify the characteristics of a market and the consequences of failure to define one in terms of consumer characteristics and competitive businesses.
- Students will be able to list typical sources for obtaining financing for a business.
- Students will be able to calculate simple financial projections.
- Students will be able to match tasks and functions with staff positions.
- Students will be able to describe ways of promoting a business.

RATIONALE

A large number of marketing and distribution people go into business for themselves. Therefore, chances are good that many students who are interested in careers in this field ultimately will decide to start their own business. Exposing students to the many career options available in marketing and distribution requires experimentation with entrepreneurship.

Exploring entrepreneurship as a career requires an understanding of three important elements: 1) personal suitability for such a venture, 2) requirements for planning the business, and 3) requirements for operating the business. This unit concentrates on the second phase—planning the business.

The planning phase is one of the most critical elements to successful entrepreneurship (a fact often overlooked by persons starting their own business). In addition, study of the planning phase is practical in school settings. Opportunities for junior high school students to operate their own business vary significantly across the nation. If this option is viable in your setting, we suggest you utilize the resources of youth organizations, such as DECA and Junior Achievement, for this venture. These youth organizations have proven to be highly successful vehicles for this kind of activity.

CONCEPTS

- An entrepreneur is one who organizes, manages and assumes the risk of a business or enterprise.
- Entrepreneurship represents a frequent career path for persons in marketing and distribution. Many goods and services are marketed and distributed through small, self-owned businesses.
- Personal, occupational and life-style characteristics of entrepreneurs can be found in Unit 8.
- The planning phase in starting one's own business is one of the most critical elements in successful entrepreneurship.
- Planning involves decision-making based on knowledge of the requirements of the industry and community regarding the type, location, capitalization, form, staffing, etc., of a business.
- One major element in business planning is obtaining information about local market trends of the industry, e.g., volume of sales, size of establishments, etc.
- An entrepreneur in planning his/her business must determine the characteristics of the products he has chosen to market, e.g., is it repeatedly purchased? Is it a luxury item?
- Identifying the market is an important planning step. This step encompasses two considerations: 1) the nature of the consumer (e.g., Who is the consumer in terms of age, sex, income level, etc.? Is the consumer likely to develop a loyalty to a particular seller?) and 2) the number and characteristics of competing businesses, if any.
- The entrepreneur should consider the ease of entry into the business. Does he/she need a license for it?
- Starting a business requires money. If an entrepreneur needs to borrow money, he/she should know what kind of information a lender might require.
- Financial planning is important. The entrepreneur should know the sources of capital, e.g., personal savings, banks, SBA loans, loan companies, personal loans from friends or family and the relative advantages and disadvantages of each.
- The entrepreneur should consider the form of ownership most compatible with his/her needs and desires. The most typical forms of ownership include: proprietorship, partnership, corporation, franchise. Each of these forms has legal, financial and practical characteristics that the entrepreneur should know.
- Location of a business is a major consideration. Should it be located in a suburban shopping center or downtown business area? The entre-

preneur will determine the needs of his/her target consumer population, their ability/desire to travel, competitive businesses in the locality, environmental considerations, etc., to make his/her decision on the best location.

- The entrepreneur also plans his/her marketing campaign in terms of the promotional activities needed to introduce the new business to the public.
- Staff requirements must also be determined in terms of numbers, functions, tasks, qualifications.
- The entrepreneur must know tax requirements, federal, state and local, and required and desirable insurance.
- An entrepreneur, therefore, not only must know his/her product or service but must have knowledge of business management and have good planning skills.

ACTIVITY A. *Review of Entrepreneurship*

Introducing the Activity

1. Remind the class that they studied entrepreneurship as a potential career option in the field of marketing and distribution in Unit 8.
2. Remind them that an entrepreneur is one who organizes, manages and assumes the risk of a business or enterprise.
3. Point out that an entrepreneur must be knowledgeable about the product or service he/she is providing.
4. In addition, entrepreneurs need skills in business management, operations, finance and so forth.
5. Explain to the class that in Unit 8 they became familiar with the nature and extent of entrepreneurship in this society. In this unit they are going to experiment, in more depth, with the type of decisions an entrepreneur must make prior to establishing a business.
6. To set the framework, begin with a review of the characteristics of entrepreneurship.

Guiding the Activity

7. Remind the class that entrepreneurship is usually defined by four elements:
    - the types of businesses typically involved
    - personal traits of individuals who become entrepreneurs
    - life style associated with entrepreneurship
    - occupational characteristics of entrepreneurship
8. Ask students to review their notes from their interviews with entrepreneurs in Unit 8.
9. Discuss the "pros and cons" of entrepreneurship.

Learning More From the Activity

1. The pros and cons of entrepreneurship include:

Pros

- not having to report to anyone
- making most of the final decisions
- greater control of own income
- determining own hours
- feeling of accomplishment
- meeting a challenge
- potential for significant income

Cons

- possibility of long hours
- no feedback from experienced decision-makers
- lack of consistent income
- little assistance in making decisions
- personal life may be dominated by business
- loneliness
- insecurity (fear of failure)

2. Point out that possible negative aspects for some individuals are not necessarily negative to others. There are people who do not mind not having feedback on decisions, and so forth.
3. It is important to consider the pros and cons of entrepreneurship to assess its suitability to one's own interests, abilities and values.

Points to Stress

- There are many life-style characteristics associated with entrepreneurship.
- These characteristics should be considered in light of one's interests, abilities, and values in career exploration.

Performance Criteria

Students will be able to list 5 advantages of business ownership and 5 disadvantages. By way of written listings, students should have 4 out of 5 correct.

ACTIVITY B. *Identifying a Market*

I. Cora's Dress Shop

Introducing the Activity

1. Explain to students that one of the first considerations a potential entrepreneur must deal with is defining his/her market.
2. Point out to students that they examined the definition of a market in Unit 10. At that time, they learned that in marketing and distribution, a market has two definitions:
    a. The make-up of the consumer for the product or service.
    b. The place where the buying and selling activities for the product or service takes place.
3. Remind them that in the previous unit they selected a product or service, and defined the market segmentation for that product or service.
4. It is critical to the success of a business to first identify and define the potential market. Once this is done, the aspiring entrepreneur is better able to assess the prospect of success and to target types of service, direct the advertising, etc., to the specified consumer.

Guiding the Activity

5. Explain that now they are going to examine two mini-cases which address market segmentation, and the potential consequences of ignoring the "market"
6. Pass out the mini-case, *Cora's Dress Shop.*
7. Divide the class into small groups of 4-5 students.
8. Explain that they should list out the items which need to be considered in defining a market.

Learning More From the Activity

1. In defining a market, the business planner needs to find out:
    - what is the income of the consumer?
    - what is the age range of the consumer?
    - what is the sex?
    - where is this consumer located?
    - does the consumer have any particular attitude towards this product? (e.g., older women may be more reluctant to wear very short dresses)
    - what type of product (e.g., style of dress) would the consumer purchase?
    - how frequently would the consumer purchase this product?
    - where does the consumer shop?
2. Most of this information has been obtained by Ms. C.A. Coate, the owner of the new business.
3. Point out that knowing this information does not insure success of the business. Rather, it gives the business a better chance to succeed since marketing activities can be directed to meet the needs of the specific consumer for the product or service.

II. See the Light

Introducing the Activity

1. Explain that in the previous case the issues regarding defining a market were identified.
2. The potential consequences of not identifying these issues are great—e.g., the business person could be directing his/her entire sales promotion activities to the wrong audience.

Guiding the Activity

3. Pass out the case, *See the Light.*
4. Students should continue to work in the same small groups.
5. Explain that students should use their list from the previous case to examine this case to determine why the business failed.

Learning More From the Activity

1. In essence, Mr. DoBottom failed to investigate his market before entering it. Just because Mr. DoBottom was "turned on" by the magnetic lamp, he assumed the rest of the world would be turned on by it. Apparently, this was not the case.
2. Prior to establishing his business, Mr. DoBottom should have attempted to determine if there was a market for this product. Because of the expense, and possible impracticality of this product, many people might not be interested in it.
3. If Mr. DoBottom had investigated the market, he *might* have found out that:

- no significant market existed
- the downtown location was inappropriate for the product
- the price was prohibitive for the market
- display room was an unnecessary feature.

Points to Stress

- When the businessperson has chosen a product or service, the consumer must be identified.
- Obtaining information about the market provides the necessary information for future decisions (e.g., price, location, advertising).
- Although the scope of the market research effort may vary among businesses, the information must be obtained.

ACTIVITY C. *Financing A Business*

Introducing the Activity

1. Point out that a crucial part of starting one's own business is obtaining the money to get inventory (goods), facility, staff, etc., and to survive a period of little or no income.
2. The financing of a business requires:
   a. figuring out the costs of opening and operating a business over the period of time until it "breaks even" (sales bring in just enough money to meet expenses).
   b. obtaining the money required.

Guiding the Activity

3. Pass out the Student Information Sheet on *What Does It Cost to Start Your Own Business*?
4. Point out that this discusses the expenses an entrepreneur needs to consider.
5. After students have read and discussed the sheets, ask them what kinds of things they would have to pay for, if they were to open a book store.
6. Do they think the location of the store would be a factor in its success? If so, how might it affect the expenses of operation?
7. Ask them if they can think of examples similar to the freelance advertising layout person who can market his/her own skills and services as an independent entrepreneur.
8. Then, divide the class into 3 groups.
9. Explain that after the entrepreneur has determined the expense for his/her business, he/she must identify sources for obtaining the money.
10. Typically, the entrepreneur uses his/her own savings as one source of capital. However, in many instances, the individual will need more money than he/she can save up alone.
11. Explain that there are three major sources of borrowing capital:
    a. banks
    b. savings and loan companies
    c. Small Business Administration loan offices.
12. Assign each of the three groups to one of the three sources.
13. Explain that each group is to interview representatives from their assigned source to:
    a. identify the type of information the lender requires from the entrepreneur.
    b. the basis he uses for making a loan decision.
14. Pass out the Interview Form to serve as a guide in conducting the interviews.

Learning More From the Activity

1. Have each group of students report on their findings from their interviews.
2. List on the blackboard the types of characteristics the lenders look for in financing a business.
3. Students should analyze, as part of the class discussion, those issues which seem to be of most importance to lenders.

Points to Stress

- Identifying the costs of starting a business is critical to the success of its start-up and operation.
- There are several sources available for financing new businesses.
- Businesspersons use different combinations of these sources for financing their businesses.
- Lenders to entrepreneurs have varying requirements for providing loans.

ACTIVITY D. *Making Financial Projections*

Introducing the Activity

1. Reiterate that obtaining financing for a business

involves not only identifying the items and sources of money, but also determining the amount of money required to operate the business.

2. Point out that at this time, it is not necessary to learn the details of making accurate financial projections (a sophisticated process). However, students should understand:
    a. the basic principles and concepts associated with making financial projections; and
    b. how these relate to one another.

Guiding the Activity

3. Pass out the Student Information Sheet, *The Terms of the Game*.
4. Discuss each of the concepts with the class, using the questions in the Student Materials.
5. Pass out the case studies.
6. Students should work in small groups. Remind them to use their Information Sheet in doing the cases.

Learning More From the Activity

1. Case #1

a.
Sales = $ 50
minus CGS = 25
Gross Profit = $ 25

b.
Gross Profit = $ 25
minus Expenses = 10
Net Profit = $ 15

2. Case #2

a.
Sales = $300
minus CGS = 100
Gross Profit - $200

3. Case #3

a. Cost of Goods Sold = $.60/necklace

b. Expenses (2 people at $3.00 + 5.00 for advertising) = $11.00

c. Net Profit: (100 necklaces)

Sales (100 x $1.00) = $100
minus CGS (100 x $ .60) = 60
Gross Profit = $ 40
minus Expenses = 11
Net Profit = $ 29

d. Net Profit: (125 necklaces)

Sales (125 x $1.00) = $125
minus CGS (125 x $0.60) = 75
Gross Profit = $ 50
minus Expenses = 11
Net Profit = $ 39

4. Case #4

a.
Sales (70 x $1.50) = $105
minus CGS (70 x $0.60) = 42
Gross Profit = $ 63

b.
Gross Profit = $ 63
minus Expenses = 11
Net Profit = $ 52

5. Case #5

a. Break-even: CGS + Expenses = Sales
Answer: 10 necklaces at $1.70

(one necklace = 1 chain + 10 beads)

100 beads @ .01 = $ 1.00
10 chains @ .50 = 5.00
Expenses = 11.00
$17.00

$17 for 10 = $1.70/necklace

Points to Stress

- One of the critical tasks in planning a new business is financial projections.
- The Net Profit of a business is the remainder *after* cost of goods sold and expenses are subtracted from the sales.

ACTIVITY E. ***Organizing a Business***

I. Organization Chart

Introducing the Activity

1. Review the previous steps in this unit regarding starting a business: identifying the market, both potential customers and competing businesses; identifying funding sources; and making financial projections.
2. Another part of organizing a business is determining staff requirements. This process consists of several steps:

a. identifying the functions and tasks which must be performed to operate the business;

b. determining the number of staff needed to accomplish these tasks and functions;

c. determining which staff will perform each task and function;

d. determining how much it will cost to support this staff.

Naturally, the fourth step is calculated in making financial projections, and determining the amount of capital required to start and operate the business. The first three steps, however, are equally critical to effective planning.

2. The class will concentrate on the first three steps in this part of the unit which consists of two exercises.

Guiding the Activity

4. Divide the class into teams of 4-5 students.
5. Pass out Student Instructions, description of the company with its organizational chart, and job descriptions.
6. Each team is to match the appropriate key staff with the job descriptions.

Learning More From the Activity

1. When the teams are finished, review each team's answers in the class discussion.

   The correct responses for each description are:

   1. President
   2. Advertising Manager
   3. Sales Manager
   4. Accountant
   5. Marketing Services Manager
   6. Marketing Research Manager
   7. Vice President, Finance
   8. Vice President, Marketing
   9. Vice President, Personnel
   10. Bookkeeper
   11. Product Manager

Points to Stress

- In order to effectively plan and operate a business, responsibility for tasks must be well-defined.

II. Organizing for Work

Introducing the Activity

The simplicity of this case is intentional. First, it is set in an environment with which students may be familiar (often they wash cars for others). Second, because of the familiarity with the subject, students should be able to define the necessary tasks involved. The tasks may include washing, wiping, dusting, etc.

Guiding the Activity

1. The class should work in teams.
2. Pass out the Student Instructions and the description of the car wash operation.
3. Assign teams to:
   1. identify the tasks and functions needed;
   2. develop an organizational plan for accomplishing these tasks and functions.
4. If students are having difficulty in generating the tasks, you should help lead them through the steps involved in washing a car, e.g., washing, wiping, dusting, etc. Then, consider the issues of publicity, finances, and so forth.

Learning More From the Activity

1. Ask each team to present its organization chart, perhaps by sketching it on the board.
2. Ask each team to describe the tasks of each individual on the chart.
3. For the organizational plan, students should realize the significance of dividing labor in order to accomplish a goal. Such a plan might include one student being responsible for supervising the entire operation, another responsible for the insides of cars, another responsible for cleaning ashtrays, and so forth.

Points to Stress

- Dividing the work is essential to accomplishing work effectively.
- Describing step-by-step what must be done to accomplish the task helps to organize the work in a meaningful way.
- In order to plan and operate a business, responsibility must be assigned to individuals for specific work.

ACTIVITY F. *Promoting a Business*

Introducing the Activity

1. Explain that making a product, service or store known to potential customers is the purpose of promotion or advertising.

2. Advertising has three functions: to inform, to persuade, and to remind. Potential customers must be informed that the product or store exists. They must be persuaded to buy *your* product from *your* store by being told about your product's uses, benefits, and superior features and your store's unique and superior features. Finally, customers who have been persuaded to buy must be reminded why they are satisfied with what they bought and where they bought it.

3. Note that advertising is not only a part of the initial stages of opening a business, but continues when the business is in operation. Old customers must be reminded of what you sell and why they should continue to buy it. New customers must be persuaded to buy your product. In this exercise we will concentrate on the informing and persuading stage only because we are dealing with a store that is just opening for the first time.

4. Advertising require four major decisions:

   - what to tell in your advertising message
   - *to whom* to tell it
   - *how* to tell it
   - *where* to tell it

   Remind students that in the following exercise they will be dealing with all four decisions. You might write on the board the four key words:

   - what
   - to whom
   - how
   - where

5. Point out that another major consideration for business persons planning an advertising campaign is the amount of money they have to spend. In this exercise, students may assume that they have an unlimited amount; but it should be clear that this is rarely the case in the real world.

6. Briefly review the major advertising media or forms:

   a. *Direct Mail*: sent through the mail directly to the customer.

   b. *Direct Advertising*: handed out by salesperson or distributed house-to-house.

   c. *Business Publications*: magazines that are directed to business people.

   d. *Consumer Magazines*: either national or local, magazines read by consumers.

   e. *Newspapers*: either local, state, regional.

   f. *Directory Advertising*: includes Yellow Pages, buyers guides, and others.

   g. *Radio and Television*: either local or national.

   h. *Outdoor Advertising*: billboards, signs in front of/near a store, posters.

   i. *Transit Advertising*: signs on inside or outside of buses, trains, taxis.

7. Remind students that although many advertising campaigns use several media, they should concentrate their efforts on a single form in this exercise.

Guiding the Activity

8. Divide the entire class into three groups.

9. Pass out the Student Instructions and the case study.

10. The advertising campaign can take the form of a skit (as on television or radio), a visual presentation, or any other form, but each group should concentrate on one form only.

Learning More From the Activity

1. Ask each group to present its campaign to the class. They have been asked to include:

   a. presentation of their campaign.

   b. the group's answers to the following issues:

      - the name of the store
      - the reason for selecting a particular form of advertising
      - the type of information the consumer would need to know about the product
      - how the product can satisfy the consumer's needs or desires

2. Ask the class to constructively criticize each group's work, e.g., which presentation was most effective? Which campaign would reach the largest number of people in the target population?

3. Discuss how the campaigns might differ if Chris were to open a clothing store for babies and young children, for example, or a clothing store for young working women.

Points to Stress

- An advertising campaign must be geared so that it reaches the maximum number in the target population. A campaign for one type of product might differ greatly from that for another depending upon the kind of consumer, e.g., age, sex, and income level, that the businessperson wishes to attract.

- Campaigns may be very extensive, using many different media and covering a region, state or nation. Their extent depends upon the product and the amount of money available.
- There are many people and businesses who do nothing but advertising. These people are paid by other businesses to do their promotion activities for them.

ACTIVITY G. *Business Planning in Review*

Introducing the Activity

1. Review steps necessary for starting a business:
   - identifying a market
   - assessing local competition
   - securing capital
   - securing goods, space, staff
   - organizing staff in relation to business tasks and functions
   - determining the cost of goods
   - establishing a selling price
   - organizing advertising campaign
2. This activity gives students an opportunity to synthesize all these steps by analyzing a fictitious new business.
3. If there is a community the size of, or like, River City in your state or region, mention it to students so that they may get a mental picture of its size.
4. Distinguish "faculty" and "staff": faculty teach, and staff are involved in administrative and clerical work, food services, buildings and grounds, and so forth.

Guiding the Activity

5. Distribute the Community Description and Student Instructions to each student in the class.
6. Ask students to read the materials and to answer the questions by themselves. Be sure to tell the students that some of the questions are judgmental and that there are no necessarily right or wrong answers for them.
7. Give the students plenty of time to answer the questions.
8. When students finish, discuss their answers with the class.

Learning More From the Activity

Key to Student Questionnaire

1. Kinds of customer.
   - By "job" – faculty
     – business people
     – staff (perhaps only administrators)
     – tourists
     – visiting parents of students.
   - By income levels: probably people with money.
   - By age: probably middle-aged and older. He doesn't seem to plan a youth pitch.
2. Customers likely to travel? Yes, for special evening out.
   - Since it is the only one of its type in town
   - Since they travel to city for the evening
3. Joe's competition?
   - Country inns? Less convenient for people to travel out of town to an inn just for dinner.
   - City restaurants? Same–less convenient, although people may still go there for a change from River City.
   - Main street restaurants? What kind of meals/atmosphere are they likely to have? (low-cost, family-style, business lunches. Who do they probably cater to? (students, families at night)
   - Shopping mall restaurants? (Same questions as above)
   - Faculty Club? Only serves faculty, staff.
4. Good planning job of identification of market and competition? Judgment question.
   - Note: no other similar businesses in town or nearby.
   - Note: faculty et al. ate out in city, country inns, Faculty Club–probably like to go out for dinner. Faculty need a change from only other similar facility, i.e., Faculty Club.
5. Slow season?
   - Students will leave on holidays and vacations but they aren't Joe's target population.
   - Faculty may travel but not to a major extent.
6. Location?
   - Yes: to the west where tourists on way to/from mountains might stop–near shopping center where he will get exposure.

- No: Faculty and business people mostly near campus or to the east of town.

7. Staff

   - Host/hostess
   - Cashier
   - Waiters/waitresses
   - Chefs
   - Cooks
   - Kitchen Help
   - Wine Steward
   - Bartender

   Note: The up-front people should have experience and be skilled at their respective jobs.

   Note: The importance of good interpersonal skills here. Joe's doesn't want employees who will be rude and unpleasant.

8. Licensing?

   Yes: Health Department License.

9. Promotion and advertising?

   - Newspaper ads
   - Billboards, but note billboard laws if any, especially on road to and from mountains
   - Notices posted in faculty lounges
   - Handouts distributed/mailed to professional people, faculty, staff, businesses.

10. Financial resources?

    - Loan companies
    - SBA loan companies
    - Partner

Points to Stress

- There are many steps involved in starting a business.
- Following the planning steps and obtaining the necessary knowledge are crucial ingredients in the success of a business enterprise.

Performance Criteria

Students will be able to list the steps necessary for starting a business, including:

- identifying a market
- assessing trends
- assessing local competition
- securing capital
- securing goods, space, and staff
- organizing staff in relation to business tasks and functions
- determining the cost of goods
- establishing a selling price
- determining tax and insurance requirements

RESOURCES AND REFERENCES

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UNIT 15: THE HUNT: JOB HUNTING, FINDING, HOLDING

Teacher's Guide

OVERVIEW

ACTIVITIES	MATERIALS
A. *Locating Job Openings*	
Students identify job openings and the sources of this information for their three favorite occupations as an out-of-class activity.	Relative Advantages/Disadvantages of Resources chart, *Locating Job Openings* Instructions and Form for each student.
B. *Arranging for the Job Interview*	
Students role-play arranging for job interview.	Student Instructions. Two sets of job seeker and employer profiles: one set to each student.
C. *Preparing for the Interview*	
I. *Employer Needs to Know.* By interviewing employers, students identify what the employer needs to know about the job seeker.	Employer Interview Form for each student.
II. *Writing Yourself Up.* Students learn to sell themselves by preparing a resume and completing a job application.	Two sample resumes and one sample job application. Student Instructions, Profile on Jay Strong, and Incomplete Job Application for each student.
III. *Applicant Needs to Know.* In small group discussion, students learn what the applicant needs to know about the employer.	Student Instructions.
D. *The Interview*	
I. *Employer and Interviewee Responsibilities.* Students identify the issues concerning the interview responsibilities of the employer and applicant by analyzing a sample dialogue and profiles.	Student Instructions. Dialogue and Profiles for each student.
II. *The Interview.* Students practice their interviewing skills in role plays.	Student Instructions for each student. Two Employer Profiles and Two Applicant Profiles: one of each to each student.
E. *Follow-Up on Employment Contacts*	
Students discuss importance of follow-up.	
F. *Holding a Job*	
Students analyze mini-cases to determine reasons why people become dissatisfied with jobs.	Chart on *Why People Leave* and Case Studies for each student. Teacher's Key.

OBJECTIVES

- Students will be able to identify resources for locating job openings.
- Students will be able to demonstrate job interviewing skills.
- Students will be able to identify the essentials for maintaining a job.

RATIONALE

This unit requires students to examine the process which must occur once they have made career choices–i.e. the process of seeking, securing, and holding a job. This process ranges from making the initial contacts for locating employment to maintaining a job. It includes:

a) identifying and locating potential job openings
b) arranging for the job interview
c) preparing for and attending the job interview
d) following-up on employment contacts
e) holding the job

The content of this unit is not unique to marketing and distribution. Rather, it provides skills which are essential for any occupational cluster. It is included anyway for two very important reasons. First, since students are encouraged to assess themselves and occupations in-depth, they should also have a mechanism for completing this "job-seeking" process. Second, the critical nature of treating job-hunting professionally is seldom realized by adults. Therefore, as part of the career planning process, students should be made cognizant of the steps in seeking a job and of the importance of accomplishing these steps well.

CONCEPTS

- Job-hunting skills include identifying and locating job openings, arranging for a job interview, preparing and attending the job interview, following up employment contacts, and holding a job.
- Just as it is important for people to assess themselves and occupations in depth, it is equally important to know the mechanisms for completing the job-seeking process.
- It is necessary for the job-seeking process to be treated professionally if people are to maximize their career opportunities.
- The major resources for identifying job openings are want-ads, employment agencies, relatives and friends, employers, and the Employment Service, each of which has its advantages and disadvantages. (The chart in Activity A describes these.)
- The burden of identifying both present and future job openings falls upon the person seeking employment.
- Arranging for an appointment for a job interview is an important step in the job-seeking process because it provides the first contact the employer has with the potential employee and it enables the parties to exchange basic information.
- There are differences among employers as to the information they require when considering a job applicant. For this reason, it is necessary for the job applicant to tailor the documents that provide this information to the specific needs of the employer.
- The job-seeker's resume is one way of providing the information an employer needs to know. It is usually prepared by the job seeker.
- The job application is another way of providing information to the employer. In the job application, as compared to the resume, the employer asks for the specific information he wants to know and the job applicant fills in the blanks. Either one or both of the documents above may be required by an employer.
- Just as it is necessary for the job seeker to be able to provide information about himself to the employer, it is also important that the job seeker obtain information about the company and the job from the employer. It is helpful for the job seeker to think about what information he wants to find out before the interview so that he is prepared to ask questions.
- Both the employer interviewer and job-seeker interviewee have the responsibility to provide complete and accurate information during a job interview. One major reason for this is that a realistic appraisal on both sides will avoid misunderstandings and disappointments later. It is sometimes the case, however, that one or the other is not completely straightforward. This may occur because the job seeker does not want to ruin his chances for a job or the employer does not want to scare off the job seeker.
- Following-up employment contacts is an important part of the job-seeking process as a matter of courtesy, to show continuing interest in the job, and to find out where you stand.
- Bad working habits, either on the part of employer or employee, have an impact on everyone. They cause dissatisfaction which may eventually result

in termination of employment. The employee may resign, or the employer may fire the employee.

ACTIVITY A. *Locating Job Openings*

Introducing the Activity

1. Review major resources for identifying job openings: classified advertisements or want-ads, employment agencies, relatives and friends, the Employment Services and employers. Show samples of want-ads from newspapers, employment agencies' ads from yellow pages, an Employment Service form from your local Employment Service office.
2. Examine the relative advantages and disadvantages of each resource. (The chart provided may be useful in helping the class to identify these factors).

Guiding the Activity

3. Ask each student to choose his/her three favorite marketing and distribution jobs.
4. As homework assignment, ask each student to complete Identification of Job Openings form and return to teacher. Meet individually with students who have difficulty.

Learning More From the Activity

1. Ask students to find out where the local Employment Service is.
2. Have students identify three local employment agencies; use yellow pages and/or classified ads.

Points to Stress

- The burden of locating potential jobs is upon the person seeking the job.
- There are several resources for identifying jobs and each resource provides certain advantages. Therefore, the resource should be chosen judiciously. Several resources may be used at once.
- Identifying *potential* (future) job openings can be as useful to the job hunter as identifying present job openings.

Performance Criteria

Students will be able to identify resources for locating job openings.

Students will be able to list 5 sources of information on job openings.

Students will be able to list an advantage and a disadvantage of each type of source.

ACTIVITY B. *Arranging for the Job Interview*

Introducing the Activity

1. Explain to the class that after identifying job openings, the next step in the job-seeking process is to arrange an apointment for a job interview.
2. Discuss with the class the importance of this step. Since it may be the first "contact" the employer has with the potential employee, the applicant should make every effort to present himself in a favorable manner.
3. If the correct information is given by the employer and applicant in this conversation, it may be determined by either or both of them that there is no need for a formal interview. For example, the employer may determine at this point that the applicant does not have the experience to qualify for the position. On the other hand, the applicant may determine through the conversation that the job is not what he/she interpreted it to be.
4. Therefore, it is important that each asks the right questions at this time.

Guiding the Activity

5. Pair off the entire class. Give each partner a different set of profiles, i.e. either Employer 1 and Applicant 2 or Applicant 1 and Employer 2. Each pair of students should work together for both role-plays.
6. Explain to the class that the job-seeker is calling the employer on the telephone to arrange for an appointment for a job interview.
7. Each pair of students should decide who plays the employer and applicant in the first role-play. Each team should alternate these roles in the second role-play.
8. The student pairs should *not* face one another in this role-play. One should either have his/her back turned, or sit sideways. This simulates more accurately the telephone situation. Players should not have the advantage of facial communication.

Learning More From the Activity

1. After students have finished playing both rounds, ask the "employers" to assess them from their point of view. Focus on such questions as: Did the applicant leave a favorable impression? Was he/she polite? Was he/she business-like? Did you get all the information you needed?
2. Then ask the "applicant" to do the same from his or her point of view.

Points to Stress

- It is essential that both employer and applicant ask the right questions to determine whether a formal interview is worthwhile.
- First impressions are important in the job-seeking process.

ACTIVITY C. *Preparing for the Interview*

I. Employer Needs to Know

Introducing the Activity

1. Explain to the students that preparing for an interview takes several steps. The interviewee, i.e., the job applicant, must identify what the employer needs to know about him, supply this information in written form either in a job application form or a resume; and identify what he/she needs to know about the employer.
2. Tell the students that they will be looking at each of these steps separately in the exercises to follow.
3. Explain to the students that there are differences among employers regarding the information they require. Although all employers are interested in an applicant's work history, education and salary objective, some request detailed information about languages spoken, travels, hobbies, extracurricula activities in school, etc.
4. In this exercise, groups of students will interview marketing and distribution employers to find out what these employers need in terms of applicant information. Point out that the larger the number of people they interview the more likely they are to see differences when they pool their information.
5. You might invite a personnel manager, Employment Service Officer, or someone who works in an employment agency in addition to sending students into the field.

Guiding the Activity

6. Divide the class into groups of 4-5 students each.
7. Ask each group to interview at least one marketing and distribution employer or personnel officer (person in charge of hiring). They are to obtain the information requested on their Interview Forms.
8. Remind students of interview protocols: making an appointment if necessary, telling the employer the purpose of the interview, thanking him/her, etc.
9. When students return to class, pool their information by writing items on the blackboard.

Learning More From the Activity

1. Note that there are differences in what various employers need to know.
2. There is also basic information that all employers seek, such as: training and education; work experience; availability; salary goals.

II. Writing Yourself Up

Introducing the Activity

1. Explain to the class that there are several ways in which employers obtain the information which they need. Refer them to the data they obtained in Item 2 of the Employer Interview Form.
2. Tell the class that almost all employers require written documents rather than relying solely on the oral information they obtain in interviews. There are two basic types of documents: the resume and the job application. Usually these are completed before the interview.
3. Show the class sample resumes and job applications (examples are included in their materials). Use overhead projection, bulletin boards, or handouts.
4. Note how these documents include the information required by employers as discovered in the previous exercise.
5. Note also that one of the applications is simple, the other far more complex. The class should be aware that there are a variety of job applications used and different types of information requested.

Guiding the Activity

6. Pass out the Autobiography of Jay Strong and the Student Instructions. This autobiography is purposely written in a lengthy prose form so that students will have to dig out relevant information.
7. Divide students into groups of 4-5 students.
8. Each group has two tasks, as described in their Instructions, i.e. to prepare a resume based on the autobiography and to complete a job application based on the same autobiography.
9. Point out that on the resume work experience is presented in chronological order with the most recent job first.

Learning More From the Activity

1. Compare the resumes students prepared. Note similarities/differences. What similar points did students include? What different points? Why?
2. Ask students to explain what they considered the most important information.
3. Note to the class that there are many ways of preparing resumes. (The resumes prepared by the groups will probably illustrate this).
4. Note that the same information about Jay Strong was documented in two very different ways in the resume and application. Which do they feel presents Jay better? Why?

Points to Stress

- There are many ways to document the same information.
- Many people have more than one resume depending on the type of job they seek. Each emphasizes the most relevant, favorable information for the occupation or job at hand.

III. Applicant Needs to Know

Introducing the Activity

1. Note to the class that just as the employer needs to obtain information about the applicant, the applicant must obtain information about the employer in the job-seeking phase.
2. Discuss the reasons for the above: e.g., that an applicant should know everything that he can about a job before he commits himself to it. The less he knows the more likely he is to be disappointed and dissatisfied.
3. This exercise asks students to come up with a list of all the job characteristics they would like to know before they decide whether or not to take a job.

Guiding the Activity

4. Divide the class into small groups.
5. Pass out the Student Instructions.
6. Students are asked to imagine that they have several job interviews lined up and to list the characteristics they need to know in order to make a decision regarding which job to take.
7. Someone in each group takes notes for use when the class reconvenes.
8. When the class reconvenes, ask each notetaker to name the characteristics his/her group thought of.
9. List these items on the board.

Learning More From the Activity

Use the questions below to identify information items students may have identified.

Job Characteristics

1. *About the Company*
   - How much vacation will you receive in first year, etc.?
   - How much sick leave do you accrue; over what time?
   - Does the company provide any form of insurance (life, hospital, etc.)?
   - Does the company provide any type of savings plan (credit unions, stock benefits, etc.)?
   - Does the company have any special fringe benefits (athletic facilities, etc.)?
   - What is the overall organizational structure of the company?
   - Where does your immediate supervisor fit into this organizational structure?
   - How long has the company been operating?
   - How fast has it grown?
2. *About the Specific Job*
   - How many people are in your division (area of work)?
   - Who is your supervisor?
   - What are the promotional opportunities in that area?
   - Any specific characteristics about the job or the people you might need to know?
   - What are the hours?
   - What is the wage or salary?

Points to Stress

- Information exchange is vital in the job seeking situation. Some information is provided in documents prepared before the interview by the applicant. Some information about the employer can be obtained from company brochures. Much information is exchanged in a good interview.

- The applicant needs to realize the importance of obtaining complete information before choosing to take a job.

ACTIVITY D. *The Interview*

I. Employer and Interviewee Responsibilities

Introducing the Activity

1. Review the previous activities in this unit. Students have located job openings, arranged for an interview, and prepared for an interview by identifying information the employer needs to know, by documenting this information in resumes and application forms, and by identifying what the applicant needs to know.
2. Describe the activities in this unit. First, students will identify issues concerning the interview responsibilities of employer and applicant. Second, they will practice interview skills.
3. Be sure that the students understand that the central issue in the first exercise is what the interviewer and applicant responsibilities are in terms of providing complete and accurate information during a job interview.
4. Encourage students to remember the issues raised in the previous activities–information employer needs, applicant needs, etc. when they are doing their interviews.

Guiding the Activity

5. Distribute the dialogue and two profiles corresponding to the dialogue to the class.
6. The dialogue is a job interview between the general manager of a supermarket (John Goodland) and a job applicant (Bob Casper). The profiles contain more information about the job and about the applicant than comes out in the dialogue.
7. Each student is to compare the dialogue and the profiles, and identify what information is missing–i.e., wasn't provided by one or the other party.

Learning More From the Activity

1. Discuss the fact that a lot of the information that each of the participants has does not come out in the dialogue. For example, Bob is only looking for temporary work for eigh weeks, but he doesn't say so. In addition, Bob does not ask John Goodland all the questions one might ask in a job interview; the entire area of fringe benefits is overlooked. On the other hand, John Goodland doesn't tell Bob that a lot of heavy work is required and that overtime is frequently required (rather than 'sometimes' as he says in the dialogue).
2. Ask students what they think about omitting information. Is it ethical?
3. Raise the questions of whether information not specifically asked for should be volunteered.
4. Explore the reasons why people might not volunteer certain information and the implications of these omissions.

Points to Stress

- There is a general responsibility of the interviewer *and* the interviewee to be straightforward and honest during the interview.

II. The Interview

Guiding the Activity

1. Divide the class into teams of two students.
2. Distribute one set of role-plays to each pair.
3. Each pair of students is to alternately portray the employer and the applicant.
4. Allow 15 minutes for the first round, then have players switch roles and hand out the second set of profiles.

Learning More From the Activity

1. Ask students, as both "employer" and "interviewee", to discuss the kinds of information they needed, what information they failed to get, and why.
2. Ask students to constructively assess their own and their partner's interview skills and performance.
3. Invite an employer, personnel director, employment agency representative, or Employment Service representative to visit the class to:
   - provide more information about what an employer looks for, and
   - give students more interview practice.

Points to Stress

- Good interviewing techniques, for both employer and interviewee, are skills that improve with time and practice.
- Almost everyone at some time in his/her life sits on one or the other side of the table.

- The more accurate and complete the information that is exchanged the more likely will be job satisfaction.

Performance Criteria

Students will be able to demonstrate interviewing skills.

Ask students to interview each other in pairs. They should first establish the business and job opening in question. The rest of the class should listen and assess each pair by writing "Good Points" and "Points for Improvement" of the applicant and the interviewer. If time does not permit all students interviewing in front of the whole class, use student assessments as a basis for evaluating their understanding of good and poor interviewing performance--in other words, evaluate the evaluators.

ACTIVITY E. *Follow-up on Employment Contacts*

Introducing the Activity

1. Discuss with the class the importance of the job applicant following-up on employment contacts. Students should know that the burden is upon the applicant to carry through all contacts.

Guiding the Activity

2. Elicit from students various ways of following-up. These include:

   - sending thank-you letters to persons who have given them leads to jobs
   - returning all calls to people (friends and employers) who have called
   - calling the employer after a reasonable time to learn if he/she has made a decision
   - informing employment agencies, and other employers, once the applicant has made a decision.

Learning More From the Activity

1. Explain to the students that following-up on contacts accomplishes several useful purposes. First, as a matter of courtesy, it is good manners to inform persons of any decisions made. Second, calling an employer after a reasonable time indicates to the employer that the applicant has a sincere interest in securing the job. Third, it gives the applicant information he/she needs to know. Fourth, staying in touch with business contacts can be helpful in the future when searching for another job.

ACTIVITY F. *Holding the Job*

Introducing the Activity

1. This section is intended to illustrate the importance of holding a job once it is obtained.
2. Present the chart which lists some of the reasons an employer becomes dissatisfied with an employee, and some of the reasons the employee becomes dissatisfied with the job. The class should generate any other categories which they feel should be included on this chart.
3. Note that the purpose of each case that students will be analyzing is to highlight the impact upon the employer, employee and colleagues of bad working habits either on the part of the employee or the employer.

Guiding the Activity

4. Divide the class into small groups of 4-5 students. Hand out the five mini-cases which illustrate situations on a job.
5. Each group is to answer the questions at the end of each mini-case.
6. To conclude this section, invite an employer (or several employers) to visit the class to discuss employer's views on good work habits. At this time, the employer should also explain to the class general procedures regarding paychecks--i.e., how often they are distributed (monthly, bi-weekly, weekly) and the items generally withheld from a check (F.I.C.A., income tax and in some cases, insurance, etc.).

Learning More From the Activity

1. In a class discussion, discuss each case.
2. With the information triggered by the mini-cases, the class should be able to fill in specific items for *Why People Leave*. A key to the chart is included for you.

Key to Chart – Why People Leave

Reasons People Are Fired
(Employer's Point Of View)

- frequent lateness
- excessive absenteeism
- troublemaker
  - starts fight with co-workers
  - prevents others from working
- lacks skills to do the job
- can't or won't follow directions
- doesn't get along with co-workers
- dishonesty
  - shoplifting
- doesn't follow company rules
  - drinks alcoholic beverages on job
  - drug addict
  - uses company property for private use
  - vandalizes company property

Reasons People Leave Jobs
(Employee's Point of View)

- salary too low
- inconvenient hours
  - mandatory overtime
  - shifts at odd hours
- displeased with type of work
  - tasks aren't what was expected
  - too much paperwork
  - not enough or too much responsibility
  - too physically strenuous
  - not challenging enough or too challenging
- displeased with supervisor
  - unclear instructions
  - lack of feedback
  - personality conflict
  - too much or not enough supervision
  - supervisor doesn't utilize all of one's abilities
- displeased with co-workers
  - don't do their share of the work
  - personality conflicts
- no promotional opportunities
  - not interested in available openings
  - dead end job
- location
  - no public transportation
  - no parking available
  - moving to different location

Points to Stress

- There are many reasons for dissatisfaction from both the employer and the employee points of view.
- An accurate and straightforward job interview may help prevent some of these dissatisfactions from arising.
- In the job setting, open communications between employer and employee help mitigate dissatisfaction.

Performance Criteria

Students will be able to identify reasons for job turnover.

Ask students to list five reasons why people are fired and 5 reasons why people leave jobs.

RESOURCES AND REFERENCES

"About Getting A Job." Greenfield, Mass.: Channing L. Bete Co., 1969. Pamphlet contains information on where to look for jobs, sample resumes, and interview procedures.

Bolles, Richard N. "What Color Is Your Parachute?" Berkeley, California: Tenspeed Press, 1972. Practical, humorous, job-hunting manual helpful as teacher reference.

Cobb, M.C. *Get That Job*. Cowles Book Co., Inc., New York. Book helps student assess qualifications and discuss role of personality in success. Includes practical guidelines for the interview and application.

"18 Almanac." Approach 13-30 Corporation, 1005 Maryville Pike, S.W., Knoxville, Tennessee. A handbook for leaving high school that contains humorous cartoon series entitled "All in the Job Hunt." Practical suggesstions on applying and interviewing for a job are included.

Fast, Julius. *Body Language*. Pocket Books, 1970. Book shows that how you sit, stand, look at people, etc., communicates things about you.

Gelinas, Paul and Robert. *How Teenagers Can Get Good Jobs*. New York: Richards Rosen Press, 1971. Book gives students practical information on how to apply and interview for a job.

Keefe, John. *The Teenager and the Interview*. New York: Richards Rosen Press, 1971. This book provides information about all the interviews teenagers will take. Valuable information on applications and techniques of applying for a job is also included.

"Preparing For An Interview," J.C. Penney Co., Inc., New York. (Free loan available from local J.C. Penny.) Filmstrip-cassette kit designed to help student prepare for job interview.

Rich, James R. *Getting the Right Job*. Columbus, Ohio: Ohio Distributive Education Materials Laboratory, 1969. Teaching unit on how to get a job. Includes exercises in which students obtain training in letters of application, resumes, applications and interviews. Contains transparency originals from which duplicate masters can be made.

"Why Young People Fail to Get and Hold Jobs." New York State Department of Labor, Albany, N.Y. Booklet identifies reasons why people don't get and keep jobs.

"Your Job Interview." Guidance Associates, Pleasantville, N.Y. 1966. Kit designed to help student prepare for job interview. Filmstrip-cassette.

UNIT 16. CAREER PLANNING

Teacher's Guide

OVERVIEW

ACTIVITIES	MATERIALS
A. *Developing a Career Plan*	
Students will develop an individualized career plan.	Career Planning Scheme A to each student. Career Planning Scheme B Career Plan to each student

OBJECTIVES

- Students will review and synthesize the information learned in previous units.
- Students will develop individualized career plans.

RATIONALE

Prior to this unit, students have explored the basic concepts of marketing and distribution, their own interests and abilities, and the characteristic industries and occupations in marketing and distribution. In this unit, students should internalize this information to achieve a single outcome: to develop a realistic and usable career plan. The information to achieve this outcome has been presented to students in various forms. Now, however, they must synthesize this information into a comprehensive plan.

The plan is intended to be used only by the individual who develops it. That is, it is a guide for the student, and therefore should be structured for him/herself. It is a document which can (and probably will) be revised over time as the student's interests and abilities increase and change. Nevertheless, it should serve as the rudiments of a plan with a purpose– to be used and followed. Further, the process of developing it, and the skills exercised in so doing, are at least as important as the plan itself.

All of the material covered in this curriculum provides input for the career plan. Included in this activity are two graphs (B for your use, and A to be displayed or distributed to the class) which illustrate how the concepts which have been taught are the functions of the career plan. Refer back to the chart in the Introduction which synthesizes these concepts and explains the contribution of each concept to developing the career plan.

CONCEPTS

- The purpose of a career plan is to serve as a roadmap for achieving a specific career goal.
- The career plan is a document which should delineate a person's job preferences, including industry, location, size of company, etc., the specific education and training requirement to prepare for the career, and specific work experience which may increase one's capacity to achieve the career objectives.
- The major elements of a career plan include:
    - career objective
    - education and training required
    - work experience either required or desired

  These components have been addressed at several points throughout this curriculum.
- Analysis of the major components of the career plan in previous units has demonstrated that in career paths, movement among jobs could be either lateral or upward. That is, a person could move either within the same industry or across industries. Or the person could advance from salesperson to sales manager, or from salesperson of automobiles to salesperson of real estate. Any of the above moves might represent a step in the person's career path.
- In previous units, it has also been illustrated that there is more than one way to achieve the same goal. Persons who ultimately reach the same career point may have followed diverse routes. The selection of the route should depend upon the individual's particular interests, abilities, values, resources and chance. For example, one student may prefer to go to school, while another may prefer to gain the credentials and skills through job experience. This decision is the student's.
- The same career planning process should be used throughout a person's working lifetime. Therefore, even if students ultimately decide to alter their career objective, they may take advantage of this process.

ACTIVITY A. *Developing a Career Plan*

Introducing the Activity

1. Describe the purpose of this unit as a culmination of all the activities students have performed in this curriculum. Students now have an opportunity to synthesize all this information into a comprehensive whole and to put their new knowledge to use for themselves by developing a career plan.
2. Briefly review with the class the purpose and the components of a career plan, using the concepts described above.
3. Use the charts contained in these materials to illustrate how the concepts which have been taught funnel into the career plan. If feasible, the graph to be displayed to the class can be prepared as an overhead projectual with overlays. That is, as you discuss each concept, display that concept in its proper place in the development process on the screen. However, the graph can be written on the blackboard in the same manner, or duplicated and distributed to the class.
4. Briefly review the chart in the Introduction which

synthesizes the concepts and explains how each concept relates to career planning.

Guiding the Activity

5. Students will be working alone during this exercise although they may need your assistance.

   Emphasize that this plan is not merely a hypothetical exercise but is intended for the students' use and therefore they should be realistic and serious about their work.

6. Ask students to work on a few sections of their plan at a time since it is unlikely that they can do a good job in one class period.

Learning More From the Activity

1. At the end of the unit, volunteers can be solicited to share their plan with the rest of the class. Each plan should be reviewed by you before the student completes the unit.
2. Remind the students that the career plan is an ongoing, working document intended to be used and changed and used again.

Performance Criteria

Assess career plans for comprehensiveness in terms of:

- statement of career objectives
- education and training requirements
- experience required as indicated by jobs to be sought and for how long
- special considerations (e.g., size of business, location, etc.)

It is essential that students be evaluated only in terms of how well they developed their career plan, rather than in terms of what career objective the plan serves.

RESOURCES AND REFERENCES

Arnold, Arnold. *Career Choices for the 70's*. New York: Crowell-Collier Press, 1971. Book helps student evaluate aptitudes and interests relative to career. Includes information on routes to careers.

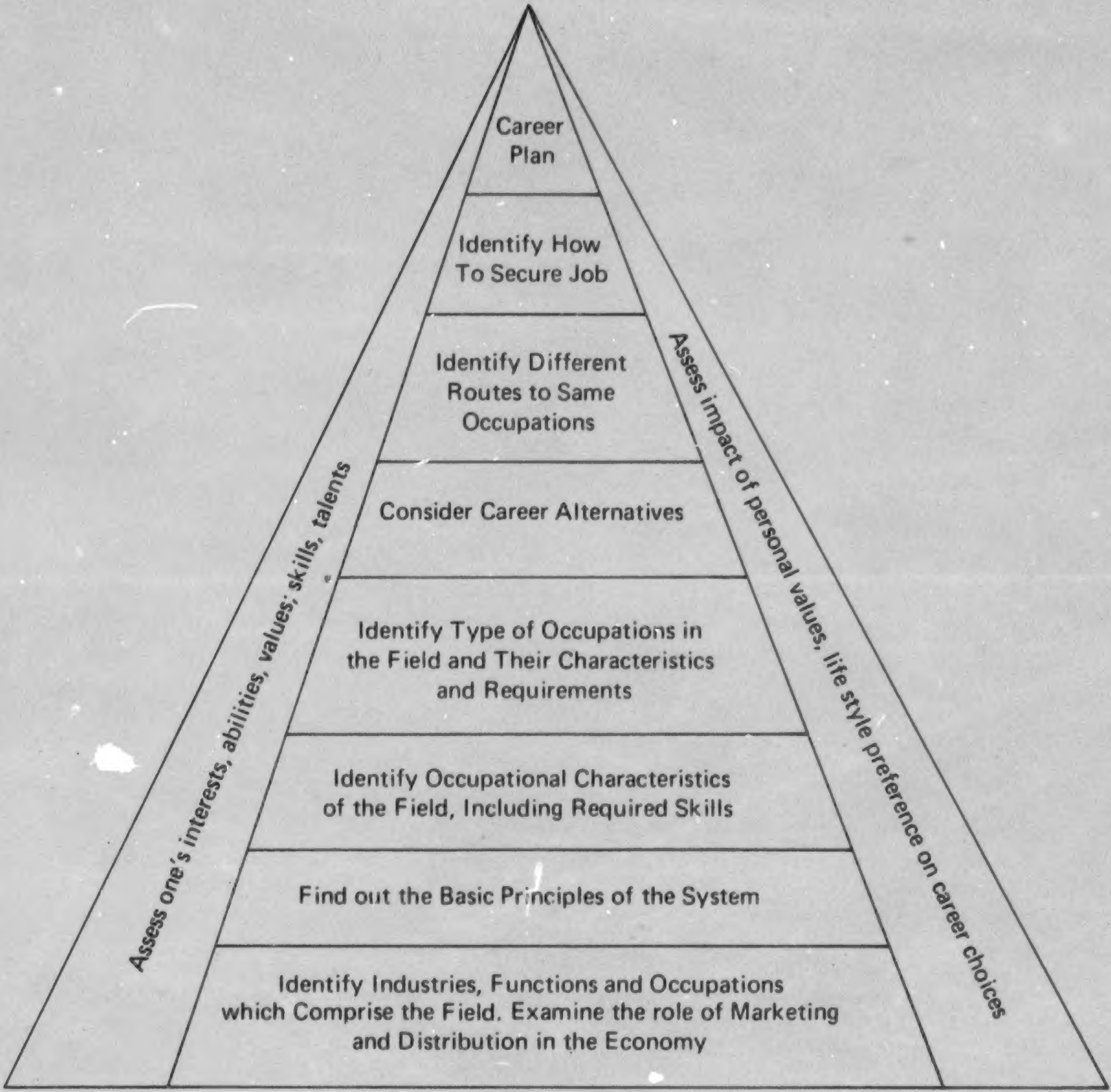
"Career Development: Education for Living." New York: J.C. Penney, Inc., 1974. (Free loan available from local J.C. Penny.) Filmstrip-transparency cassette kit designed to help student probe own attitudes about work and leisure. Case study involving career planning is included.

Kay, Evelyn R. *Directory of Post-Secondary Schools with Occupational Programs*. Washington: National Center for Educational Statistics. U.S.G.P.O., 1973. Comprehensive listing of postsecondary schools and institutions offering career-related programs. (Does not include institutions which grant bachelor's degrees.)

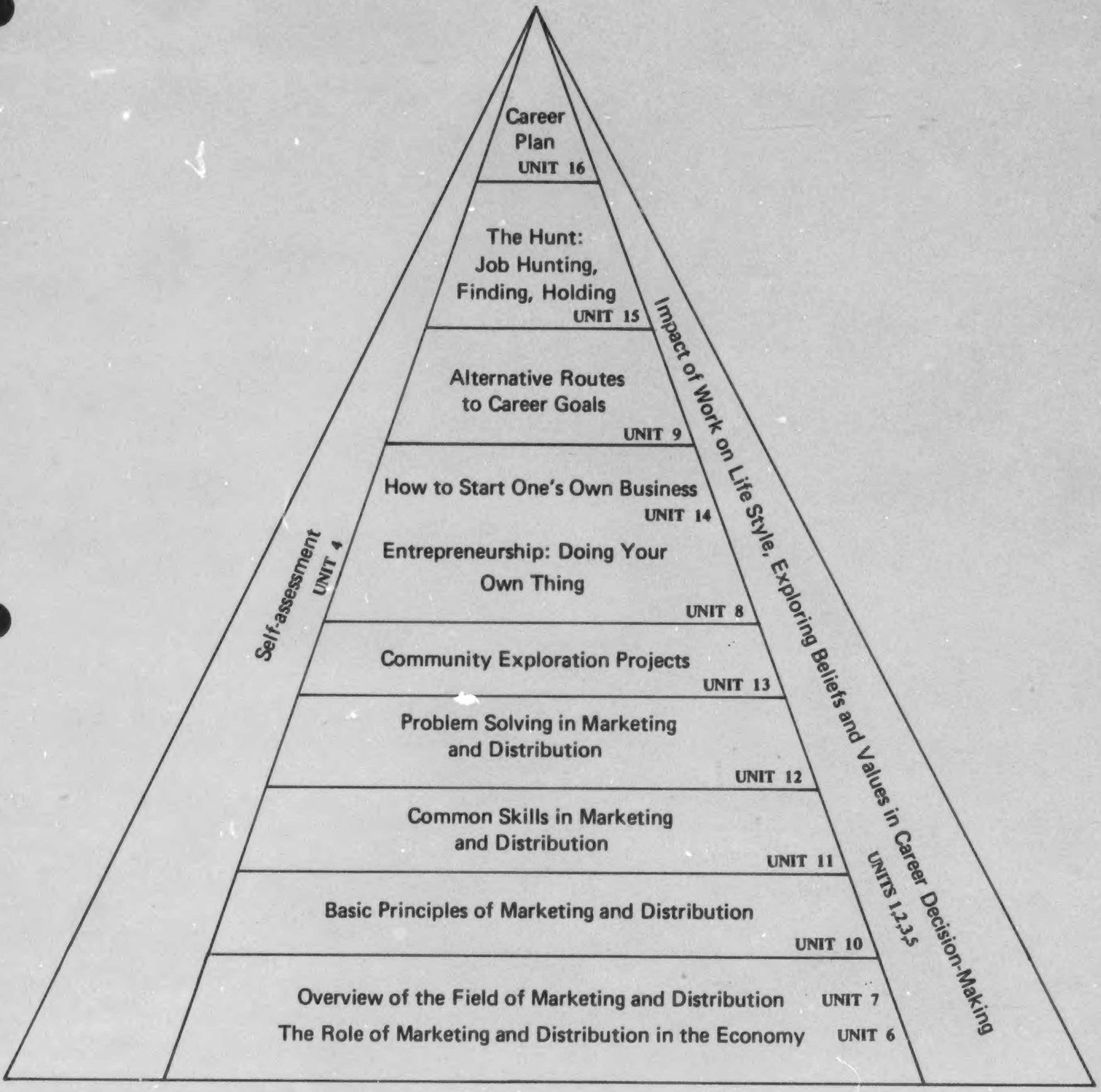
Liston, Robert. *On the Job Training and Where To Get It*. New York: Messner, 1967. Book explains where you can get on-the-job training for your career.

Lovejoy, Clarence E. *Lovejoy's Career and Vocational School Guide*. New York: Simon and Schuster, 1973. Guide to schools and colleges, classified by type of occupational training offerred.

CAREER PLANNING – SCHEME A


Career Plan
Identify How To Secure Job
Identify Different Routes to Same Occupations
Consider Career Alternatives
Identify Type of Occupations in the Field and Their Characteristics and Requirements
Identify Occupational Characteristics of the Field, Including Required Skills
Find out the Basic Principles of the System
Identify Industries, Functions and Occupations which Comprise the Field. Examine the role of Marketing and Distribution in the Economy
Assess one's interests, abilities, values; skills, talents
Assess impact of personal values, life style preference on career choices

CAREER PLANNING – SCHEME B


Career Plan
UNIT 16
The Hunt: Job Hunting, Finding, Holding
UNIT 15
Alternative Routes to Career Goals
UNIT 9
How to Start One's Own Business
UNIT 14
Entrepreneurship: Doing Your Own Thing
UNIT 8
Community Exploration Projects
UNIT 13
Problem Solving in Marketing and Distribution
UNIT 12
Common Skills in Marketing and Distribution
UNIT 11
Basic Principles of Marketing and Distribution
UNIT 10
Overview of the Field of Marketing and Distribution
UNIT 7
The Role of Marketing and Distribution in the Economy
UNIT 6
Self-assessment
UNIT 4
Impact of Work on Life Style, Exploring Beliefs and Values in Career Decision-Making
UNITS 1,2,3,5

UNIT 1: CAREER DECISION-MAKING

Student Materials

OVERVIEW

ACTIVITIES	MATERIALS
A. *What is a Career?*	
With a list of six questions which address the components of career planning, study and discuss four biographical sketches to determine whether each had a career or job based upon planning, education or training, stability on jobs, continuity between jobs, and upward mobility.	Four biographical sketches and list of six questions
B. *Planning and Chance in Career Decision-Making*	
Interview two adults, one of whom is employed in a marketing and distribution occupation, to determine the extent of planning and chance in their careers.	Employee Interview Form

ACTIVITY A. *What is a Career?*

Instructions

Read the following sketches and answer each of the six questions below for each individual:

• Planning:	What planning did each individual do concerning his/her future employment? Did he/she start with a long-range view of the future? Did the individual have goals and plan to meet those goals? Did he/she implement the plan and achieve the goals?
• Training:	Was special training or education involved? Was training obtained through a job?
• Stability:	How long did each individual stay on each job? Did the length of employment have an effect on his future employment?
• Continuity:	Was there continuity among the jobs each individual held? Did the skills and experience of one job enable the individual to obtain later jobs?
• Mobility:	Was there upward mobility between jobs?
• The Future:	What is a likely next step for the individual in each sketch?

BIOGRAPHICAL SKETCH 1:

Janet Jameson had never taken a business course in either junior high or high school. When she graduated from high school, she had difficulty finding a job, but finally with the help of her uncle who was the manager of a supermarket she managed to get a job as a bagger at her uncle's supermarket. She was dissatisfied with the job and decided to look for a better paying and more gratifying job. She finally found a job as a waitress at a family-style restaurant. Even though the basic pay was about the same as it had been at the supermarket, she thought that through tips she might be able to earn quite a bit more money than she had in the supermarket. Janet held this job for six months before deciding that the tips didn't justify all the hard work and being on her feet all day. She managed to find another job as a cashier in a small neighborhood grocery store. Not only was the pay better, but, in addition, she didn't have to ride to work and could save the carfare she had been spending on the previous two jobs. The job went pretty well for a while before Janet got bored and began to look for a job with a little more responsibility and "style" attached. Although she was young and had little experience in the business, the owner of a fancy French restaurant decided to hire her as head hostess because of her poise and excellent job recommendations. Janet worked at this job for three years. Finally through contacts she had made, she learned that an old friend of hers was opening a diner and was looking for a partner. She borrowed money from her uncle to support her end of the business and went into business at the diner. Now, after five years, Janet is the partner in a quite successful business.

BIOGRAPHICAL SKETCH 2:

Bob Casper was an energetic young man who started working when he was in high school. His first job was in a car wash. Although he didn't find the job very exciting, he worked at it because it was easy and he could pretty much work the hours he wanted to. After he graduated from high school, he didn't have much of an idea of what he wanted to do. Reviewing the newspaper ads one day, he noticed several job openings in a major bank for bank tellers. He applied for the job and was accepted. He worked as a bank teller for two years before he became bored with the job and decided to look for another job. Besides, he felt that the job didn't pay very much. Through a friend of his, he managed to get a job as a used car salesman. Although the basic pay wasn't much better than the bank, there was the opportunity to make more money on commissions for the sale of cars. After two years as a car salesman, Bob decided to look for yet another job. Since he had gained some skill as a salesman from his job as a car salesman and liked to sell, he decided to look for a job that involved selling. Through a private placement agency he located a job as a furniture salesman in a neighboring town. He took the job and worked there successfully for one year. Bob got married during that year and soon found that the income from his new job was not enough to support him and his wife. Finally, Bob found a job which took advantage of his ability as a salesman and met his income needs. The new job was as an insurance salesman for a large, well-known company. After two years, Bob is still with the job.

BIOGRAPHICAL SKETCH 3:

Tom Jetson decided early in his high school career that he wanted to be a mechanic for jet engines. While he was in high school, he worked as a soda jerk at a local drug store. After he graduated from high school he decided to become a loader at a truck depot. He did this for six months before deciding that the work was too hard for the amount of money it paid. He switched to driving a cab and worked at this for six months.

Throughout all these jobs he kept looking for ways to finance the education and training he would need to become a jet engine mechanic. Courses offered by commercial airlines were very expensive and so far he had been unable to finance a loan through any of the local banks.

One day he passed an Air Force recruiting office and thought he would go in to see what they had to offer. Tom discovered that by joining the Air Force, he could work at related jobs, e.g., airport attendant, and thereby get the training he needed to become a jet engine mechanic. He quit his job driving cabs and joined the Air Force. Three years later, he left the Air Force and began looking for a job. Having been well trained in the Air Force, he had no trouble locating a job with a commercial airline. So far, he has been there for two years and is quite satisfied with his job.

BIOGRAPHICAL SKETCH 4:

Early in high school, Joan Flintstone decided that she wanted to be a secretary. Therefore, she took a general education program in high school and enrolled in a private secretarial school when she graduated from high school. The secretarial school offered a two year program and Joan did very well both years. Consequently it was very easy for her to locate a job upon her graduation from secretarial school. She got a job at an accounting firm where she worked for five years. She was promoted and became the supervisor of the secretaries in the firm. She soon got a higher-paying offer from an advertising firm and decided to switch. She worked as an executive secretary at the advertising firm for four years. Gradually, however, she felt she was not learning enough to stay permanently interested in the secretarial field. She looked around for something different to do and heard about a program in the State Department (U.S. Government) in which you are trained to speak a foreign language fluently and then to act as an escort-interpreter for the State Department. (An escort-interpreter is an individual trained to speak at least one foreign language who then acts as interpreter for foreign dignitaries or diplomats as they travel around the United States.) The program sounded exciting to Joan and she decided to join. She passed the entrance examinations and was accepted into the program. Joan has been an escort-interpreter now for two years and greatly enjoys her job.

ACTIVITY B. *Planning & Chance in Career Decision-Making*

Instructions

You will interview two adults to learn the role of planning and chance in their work history.

EMPLOYEE INTERVIEW FORM

1. What is your job?____

2. What made you decide to take this job?____________________________

   Was any education or training required of you for this job? _____Yes _____No

   If "Yes," specify:____

   From what source:____

3. Did you plan for a long time to get this job or did you just get it by chance?
   How did you find it?____

4. What do you like best about this job?

   ____

5. What do you like least about it?

   ____

6. What other jobs have you had?

Job	Length of Time on Job	Education or training		Like the Job?		Reason for Leaving
		Yes	No	Yes	No	

7. Is this job your career goal? _____Yes _____No

   If not, what is your career goal?________________________________

8. Did you have a career goal when you left high school?
   If so, what was it?____

UNIT 2: THE CAREER PLANNING PROCESS

Student Materials

OVERVIEW

ACTIVITIES	MATERIALS
A. *Mix and Match* Match descriptions of hypothetical individuals with job requirements. Focus is on picking jobs to suit individuals, not the other way around. Jobs are entry-level marketing and distribution occupations.	6 profiles of individuals 6 job descriptions
B. *We Are Pleased To Inform You . . .* Pick one applicant out of two for each job in marketing and distribution. Focus on picking the best qualified applicant for the job, as an employer would.	6 job descriptions 12 applicant profiles, 2 per job

ACTIVITY A. *Mix and Match*

Instructions

1. Attached are descriptions of six different jobs in marketing and distribution. These jobs are entry-level jobs, that is, jobs which people can get without any previous work experience.
2. Also attached are descriptions of six different people. The descriptions cover each person's interests, skills, ambitions and work history.
3. The goal of the exercise is to decide which job would suit which person and who would do each job best.
4. You will work on this exercise in groups. Take a few minutes to read each profile by yourself. Each group will have 45 minutes to reach agreement on matching people with jobs. If you disagree with the group choice, you should express your own selection.
5. Each group – and the group members who disagree -- will then have a chance to tell the rest of the class why they made the matches they did.

PROFILES OF PEOPLE

A. **JOHN JAMISON** is twenty (20) years old. He was discharged from the Army eight months ago. In the Army, he drove a jeep for one of the officers. Right now, John is a chauffeur, but he is dissatisfied because he doesn't like his boss very much. He is now looking for another job. He would like the hours to be flexible. John likes to drive but he doesn't have a high school diploma and this sometimes makes it difficult for him to get jobs. John isn't a social guy. He likes to keep pretty much to himself. All he wants is a chance to make some easy money.

B. **BOB HOLTON** is nineteen (19) years old. He has just graduated from high school. Bob has worked part-time, and very successfully, collecting money for the United Fund. He also works as a volunteer with young orphan boys on recreational programs. During high school he successfully ran three fairs. Bob is known for his pleasant and attractive personality. He is looking for work but does not want a permanent job because he wants his main work to continue to be his work with young boys.

C. **JANET LEE** graduated from high school one year ago. Since then she has been driving a school bus. Both parents and children like her. She is an attractive girl and has a pleasant personality. Janet likes the job well enough but would like to get a job in town. She likes working outdoors and would like to get another job that involves driving.

D. **BOB SELLERS** is eighteen (18) years old and just graduated from high school. In high school he took the general education program and learned how to type. After school Bob used to work as a cashier clerk in his uncle's grocery store. Bob is looking for a job and would like it to be a permanent job with some chance for advancement. Bob's uncle liked his work especially because he has a pleasant personality and attracted customers to the store.

E. **JOAN BARNETT** has just graduated from high school. While she was in high school she used to work part-time as a cashier in a drug store. She like working in the drug store but wished it were a bigger place where she would have more opportunity for advancement.

F. **RICHARD BROWNING**, a recent high school graduate, is an outgoing, aggressive young man. During high school he was captain of the basketball team, president of the student council and worked part-time as a sales clerk/cashier in his father's department store. Richard is looking for a job where he would eventually have a chance to move up. He doesn't mind starting at a low-level job.

JOB PROFILES

1. **The ACE Parking Lot Company** needs to hire a new parking lot attendant. They are looking for a young person who can be pleasant and sociable to customers. The duties of the parking lot attendant will be:

   - to park customer cars in the lot
   - to place a numbered tag on the windshield and give half the tag to the customer
   - to watch cars to make sure they are not stolen
   - to collect parking fee from customers depending on how long they parked
   - to take tag from customer, locate the car and return it to the customer

   These skills are generally learned on the job. The only requirement that the ACE Company has for the job is that the individual has a driver's license and, as stated above, a pleasant and sociable disposition.

2. **The Trust-Us Savings Bank** is going to hire a new accounts teller. A new accounts teller handles new accounts with the bank and comes in face-to-face contact with possible new customers. Therefore, the Trust-Us Savings Bank wants to hire someone who is pleasant, easy to talk to and convincing (so that they can convince possible new customers to open an account with the bank). The bank offers many opportunities for tellers to advance to higher-level jobs. The duties of the new accounts teller will be:

   - to interview customers who want to open a bank account
   - to explain the bank's services and to help the new customer to prepare application forms
   - to type and file list of new accounts
   - to answer questions that are telephoned in about new accounts

   The Trust-Us Savings Bank has its own training program so the only entry requirements are that the person be pleasant and sociable, a high school graduate, and know how to type.

3. **Great Foods Supermarket** needs to hire another cashier-checker. This large supermarket chain offers many opportunities for advancement. The duties of the job are:

   - to total up customers' purchases on the cash register
   - to check to make sure prices haven't changed
   - to collect money from customers and make change
   - during busy periods to help with putting the merchandise in bags

   Great Foods Supermarket does its own training of cashier-checkers. The only requirement for the job is that the individual have or be working on a high school diploma.

4. **The Old Faithful Railroad Company** is looking for a ticket agent. To give the company a younger image, they would like to hire a young person who is energetic and eager to advance to better jobs in the company. The duties of the ticket seller are:

   - to tear off tickets from roll and hand them to the customer
   - to take the money for the tickets and make change
   - to answer questions about fares, routes, schedules and reservations
   - to keep track of cash received and tickets sold

   The requirement for this job includes a high school diploma.

5. **The WeeGo Cab Company** is about to hire another taxi driver. The duties of the driver will be:

   - to transport passengers by cab for a fare
   - to pick up passengers on the street or in response to radio or telephone request
   - to collect fee recorded on taximeter and record these fares in a notebook

   The requirements for the job are that the driver have a driver's license and be eighteen (18) years old or older. Hours will be flexible.

6. **The Have-Fun Amusement Park** needs a new ticket seller at its main booth. The man who currently has the job is very grouchy and irritable and customers are constantly complaining about him. Since it's the main booth for the park, having a grouchy person there is definitely bad for business, so the Have-Fun Park is going to hire someone new who will be able to project the cheerful "Have-Fun" motto. The duties of the job will be:

   - to tear off tickets from the roll and hand them to the customer
   - to take the money for the tickets and make change
   - to answer questions about location of rides, eating places, closing time and so forth.
   - to keep track of cash received and tickets sold
   - to project a cheerful and pleasant image about the Have-Fun Amusement Park

ACTIVITY B. *We are Pleased to Inform You . . .*

Instructions

1. Your goal is to decide which of two candidates is best suited for each job. There are six jobs, with two candidates each.
2. Each of the six jobs requires experience and special skills.
3. With each job are descriptions of two different individuals who are candidates for the job. The profile describes the person's work history, skills and career goals.
4. You will work in groups. Each group will have 45 minutes to try to reach agreement on the best candidate for each of three jobs. If you disagree with the group's choice, you should express your own choice.
5. Each group will explain which candidate it chose for each of the jobs, and why.

JOB PROFILE #1: FLORAL DESIGNER

Mr. Benchley, owner of the Grow-It Florist Shop, located in the city, would like to hire a floral designer. His previous designer left work to have a baby and has decided not to return. The responsibilities of the floral designer would be to:

- work with customers on special floral arrangements
- design and fashion floral pieces and decorations
- select natural and artificial flowers and foliage
- wrap the stems of the floral arangements with floral tape, to form bouquets and corsages, sprays, wreaths, centerpieces and other designs
- plan floral settings for events such as weddings and balls
- decorate buildings, such as churches, homes and dance halls

Mr. Benchley would like to hire someone who is middle-aged because he believes that such a person will not leave soon. He would also like someone who gets real enjoyment and pleasure from the work.

PEOPLE

Rose Inchley graduated from high school three years ago. Ever since she was a little girl she took an active interest in flowers and plants. While she was in high school, she was so good at arranging flowers that she did it, even on formal occasions, for her friends, relatives and neighbors. She took two courses in high school in floral arrangements and plant growth. Her skills are:

- gardening
- making floral arrangements
- selecting natural and artifical flowers and foliage
- planning floral settings for events such as weddings and balls
- designing and fashioning floral pieces and decorations
- customer experience

Rose has never decorated the outside of buildings.

Brad Buckley is a middle-aged man who is working at a nursery (a nursery is a place where trees, shrubs and plants are grown for transplanting). He once worked at a florist shop, but did not particularly like the work. However, because of his experience, his skills are:

- designing and fashioning floral pieces and decorations
- decorating buildings
- planning floral settings for events such as weddings and balls
- selecting natural and artificial flowers and foliage
- care and maintenance of young plants

He would like another job so that he can move back to the city.

JOB PROFILE #2: MANAGER, FINANCIAL INSTITUTION

The Executive Board of the Community Bank is trying to hire a Bank Manager since their former Bank Manager has recently retired. The bank is fairly large so it is important to hire someone with a lot of experience either in banking or in an area related to banking. The responsibilities of the new Bank Manager would include:

- organizing the basic operations of the bank
- establishing and maintaining relationships with customers, with business, and with organizations to promote goodwill and develop new business.
- supervising accounting and reporting (accounting is keeping track of the money in the bank)
- developing the rules and regulations under which the bank operates
- directing the safekeeping of records and other valuable items held by the bank for its large and small depositors
- approving or disapproving loans to individuals and to large and small organizations
- supervising people in charge of holding large amounts of property (money, real estate, stocks) for individual and group clients

Clearly, the responsibilities are so great that a highly qualified person must be hired.

PEOPLE

Elmer Gantry has been vice-president for savings and loans in a small bank in Westfield. His duties and skills have been:

- hiring and supervising all the personnel in savings and loans
- organizing the savings and loan department
- approving or disapproving requests for loans
- establishing and maintaining relationships with customers and organizations to promote goodwill and develop new business
- responsible for the safekeeping of records on savings and loan transactions

Elmer's boss' recommendation would be that he had done a good job. Elmer is 36 and is looking for a more challenging and interesting job.

Pauline Swane has been working as a manager of a branch bank for three years. Prior to that she worked as an insurance representative for eleven years. She is interested in moving onto a new and more challenging job. The skills she has acquired over the years include:

- organizing the basic operations of the branch of a bank
- selling insurance, which involves developing good relationships with people to attract and keep customers
- developing the rules and regulations under which the bank branch operates
- hiring and supervising all personnel in the bank
- approving or disapproving requests for loans

Pauline has told her boss that she is looking for another job, and he said he would give her excellent recommendations.

JOB PROFILE #3: PUBLIC RELATIONS MAN OR PUBLIC RELATIONS WOMAN

A large toy manufacturer has recently moved his factory to a small town. In order to win the support of the community, he has decided to hire a public relations person to do the job. The duties of the public relations man or woman would be:

- planning programs as publicity for the new company using newspapers, magazines, radio and television
- writing articles to be included in the newspaper and magazine ads
- writing the scripts for radio and television (a script is a word-by-word description of what the announcer will say)
- approving the art work such as posters, signs or displays
- editing the company bi-weekly newsletter

The owner of the manufacturing company would like his new public relations man or woman to be outgoing, aggressive and likeable.

PEOPLE

Joe Bloom has had several jobs. He's been a traveling salesman, an insurance agent, a public relations man and in charge of advertising for a small newspaper. He is currently handling public relations for the United Fund Agency in town, but he is looking for a more challenging position. His skills are:

- selling – able to convince people to buy
- writing for radio, television, newspapers and magazines
- his knowledge of the community that the toy manufacturer is moving into

For the past six years, Elizabeth Bloomfield has worked as an announcer at the local television station. Before that she worked as a scriptwriter and broadcaster for a local radio station. Elizabeth majored in public speaking and public relations in college. Although she has never worked in public relations she has gained many skills in this area through her job and through her education. Specifically, her skills are:

- good speaking voice
- ability to write radio and television scripts and newspaper and magazine articles
- many contacts with businesses and organizations in the community from her experience in radio and television
- some knowledge of developing posters, signs and displays through her work in television

Elizabeth is looking for a new job because her current job in television takes too much time and doesn't leave her enough time for her family.

JOB PROFILE #4: BUYER, CATTLE

G.P.W., Inc. is looking for a buyer for its cattle. G.P.W., Inc. is a packing house. The duties of the buyer would be to:

- buy livestock from yards and livestock raisers
- inspect, grade and figure out the weight of the stock so that the value and amount of the beef can be determined
- contact transportation facilities to arrange for transportation of stock to G.P.W., Inc. packing houses

G.P.W. currently has a buyer of cattle, but he is also the buyer of sheep and G.P.W. doesn't think the present buyer of cattle and sheep knows the cattle-buying business well enough to do a good job for them. They therefore want to hire a first-rate person as their new cattle buyer.

PEOPLE

John Tonner was born and brought up on a cattle ranch. He has worked as a cowhand (cowboy) since he was sixteen. Now he is 30 and handles all of the operations on the ranch – from breeding the cattle to selling it. His skills include:

- breeding cattle
- running a ranch
- raising cattle
- inspecting, grading and figuring out the weight of stock so that the value and amount of beef can be determined
- contacting transportation facilities to arrange for transportation of his stock to buyers

John is tired of ranching and wants to find a different job. He will leave the ranch to his younger brother, Tod.

Tim Redford is the cattle and hog buyer for a very large packing house. He has held the job for fifteen years and his bosses think that he is the best buyer they've ever had. His skills include:

- buying livestock from yards and livestock raisers
- inspecting, grading and figuring out the weight of the stock so that the value and amount of the meat can be determined
- contacting transportation facilities to arrange for transportation of stock

JOB PROFILE #5: DEPARTMENT HEAD, SUPERMARKET

Mark Township, General Manager of Good Foods Supermarket, has to hire a new department head for the canned foods section of the supermarket. His current department head, Darwin Greenley, who had worked for the supermarket for 20 years, is retiring next month. The duties of the new department head will be to:

- supervise and coordinate activities of workers in the canned food section of a self-service supermarket
- order merchandise supplies and equipment
- plan department layout, shelf arrangements and displays
- make sure that merchandise is accurately priced, fresh, undamaged and rotated according to company policy
- train employees in company policies and work procedures
- inspect department for cleanliness and orderliness

Good Foods Supermarket would like to hire a middle-aged person for this job since many of the people who work in the department are young and Good Foods wants a strong leader whom the workers can look up to.

PEOPLE

Richard Winwood has worked as the assistant department head of a large supermarket for 5 years. His boss, the department head, is about to promote him to the head of another department, canned foods, because of his good work. Richard is now working in the meat department. Richard's skills are:

- planning department layout, shelf arrangement and displays
- making sure that merchandise is accurately priced, fresh and undamaged
- inspecting the department for cleanliness and orderliness.

Richard Winwood is 31 years old. Richard's boss has said that he learns very quickly on the job.

Janet Outwood is department head of the frozen food section of a large supermarket. She is 38 years old and has held the job for 5 years. She is looking for a new job because she is dissatisfied with her current employer. Her skills are:

- supervising and coordinating activities of workers in the frozen food department of a self-service supermarket
- ordering merchandise, supplies & equipment
- planning department layout, shelf arrangements and displays
- making sure that merchandise is accurately priced, fresh, undamaged and rotated according to company policy
- training employees in company policies and work procedures
- inspecting department for cleanliness and orderliness
- scheduling work hours and assigning duties to workers

Because of her leadership ability, her boss is considering making her the head of two departments.

JOB PROFILE #6: FASHION COORDINATOR

The owner of a large department store is looking for a fashion coordinator. He would like to hire someone who has worked primarily in large department stores, but this is not a necessary requirement. Good references are required, however. The duties of the fashion coordinator would include:

- promoting new fashions and coordinating promotion activities (like fashion shows)
- getting customers to buy new products
- studying fashion and trade magazines (a trade magazine is a magazine which describes products bought and sold in a particular field and has articles about these products)
- visiting manufacturing and merchandise markets to obtain information on fashion trends
- helping decide what kind of fashions the store will buy
- advising what merchandise to display in store windows
- selecting clothes and accessories to be shown at fashion shows

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PEOPLE

Ellen Flintstone has been a fashion coordinator for a medium-sized department store for the past five years. Although she did take some courses in fashion coordination in college, most of what she's learned she's learned on the job. Her skills are:

- setting up fashion shows
- buying fashions for the store
- evaluating trade magazine articles and merchandise
- promoting new fashions

She has other skills, but these are her main ones. She would like to get a job in a bigger store and would get high recommendations from her boss if she tried.

Alyce Jones graduated from college one year ago. She majored in fashion coordination. Since she graduated she has worked as an assistant fashion coordinator for a large department store. When she was in college she received outstanding awards for her skills in:

- setting up fashion shows
- designing and setting up window displays
- her thorough knowledge of fashion and trade magazines
- her ability to get customers to buy new products

Her current boss is very pleased with her work and is about to recommend her for a promotion.

UNIT 3: THE IMPACT OF WORK ON LIFE STYLE

Student Materials

OVERVIEW

ACTIVITIES	MATERIALS
A. *Career Choice for Personal Satisfaction*	
Focus on the influence of work on life style and of life style preferences on occupational choice.	
a. For each of two fictitious persons, select a job which best satisfies the life preferences of each.	2 People Profiles and 6 Job Profiles
b. Role-play a fictitious job seeker and a counselor. Together choose the job which best satisfies the individual's life style.	Instructions 1 People Profile and 3 Job Profiles
Partners switch roles, using new profiles.	1 People Profile and 3 Job Profiles
B. *The Working Mother*	
Examine the influence of off-the-job responsibilities on career and decision-making. Focus on the population which exemplifies this issue: women with children. Interview mothers and local employers to examine the adjustments made by each when homemaking and child care responsibilities are combined with employment Mothers enjoy being interviewed.	Interview Guides for Mothers and for Employers

ACTIVITY A. *Career Choice for Personal Satisfaction*

Instructions

The object of this first exercise is to select jobs which would be most satisfying to two fictitious people. To do so, you will have to consider what the person likes to do, what type of life he/she wishes to lead, etc. You will also have to examine the jobs described to decide if and how they satisfy these interests.

You may not be able to satisfy *all* interests and preferences. You may have to choose a job which satisfies most interests or satisfies the most important ones.

1. Read the description of the two people below.
2. Read the descriptions of the six jobs (numbers 1-6).
3. For each person, pick the job which you think will satisfy them most. Be prepared to explain why you think so.

PROFILES OF PEOPLE

Terry #1

You are an energetic, aggressive young person who left college after having studied marketing for two years. Your first job was as a salesperson for a hospital supply company which required that you travel much of the time. Since you enjoyed travel, the job appealed to you. Your success in it was rewarded with good pay, the fruits of which include a brand new sports car. Your mother has just become seriously ill, and you cannot continue in a job which requires traveling away from home. You are a good salesperson; you know the hospital supply business; and you *must* earn over $15,000 per year because you will have to pay for your mother's medical expenses. You have your eye on the top and must see a route to advancement in whatever job you take.

Pat #2

You have a varied background in many occupations. You have worked as a retail clerk, sales representative, and office manager. Your most recent job involved editing unpublished books. Although you received a handsome salary on this job, you decided to leave because you did not feel that you would be promoted to more responsible positions. Although money is important to you, salary is not the only reward for efficient and thorough work. You believe that you must have responsibility and freedom to make decisions in order to enjoy a rewarding and challenging job. You are looking for a position which can provide all of these elements as well as the promise of promotion. You feel more comfortable in a small business environment than in a large corporation.

JOB OPENINGS

#1 F. Houston Wiley, Ltd. Advertising Firm Opening: Sales Representative

F. Houston Wiley, Ltd., a large and reputable advertising firm, is recruiting a sales representative. The company trains new employees in techniques of selling advertising. It is mainly interested in certain "natural" qualities when hiring sales representatives. For example, the company believes the individual should be both aggressive and creative and should have the ability to listen to and understand the needs of the client.

The job will require some small amount of traveling, about two days per month. But promotion sometimes requires moving to another city since the firm has many branch offices. These advancement opportunities, however, are extremely good. A sales representative can eventually become a senior partner in the firm.

The starting salary is $16,000 per year.

#2 Safe, Inc. Advertising Firm Opening: Insurance Sales Rep.

Safe, Inc. is a medium-sized but growing insurance company which has recently begun to sell to residents of this area. It is seeking to employ five new sales representatives to establish the company in this relatively new territory.

The company offers excellent fringe benefits in the form of generous health insurance. The salary is $10,000 per year plus commissions. Commissions can be very high in the insurance business, especially for sales representatives of established firms.

Each sales representative sets his/her own hours based upon when his/her clients or potential clients are available to be seen. No travel outside this local territory is required.

Safe, Inc. is looking for personable, aggressive young people as sales representatives. The company believes it offers sales representatives a chance to earn a great deal of money, if they are good at it.

Often, successful insurance sales representatives become independent insurance brokers.

#3 Hospital Supply Central, Inc. Wholesale Supplier Opening: Management Trainee

Hospital Supply Central, Inc. is a wholesale supplier to hospital supply companies which in turn sell directly to hospitals. It is a very large company, with offices across the nation. It seeks an aggressive, bright young person to be trained for a management position in the Sales Division of the company. This person can expect to work eventually in the sales training or market research areas of the Division. **Hospital Supply Central, Inc.** would prefer a trainee with some knowledge of marketing and of the hospital supply business.

No travel is required in this job at present. However, one common route to promotion in this firm is to head local sales departments in branches of the firm throughout the country. Some of the firm's top people relocated as many as ten times before becoming executives in the main office.

The starting salary is $13,000 per year, with good fringe benefits including health insurance.

#4 The Drums — Book Store — Opening: Manager

The Drums, a neighborhood book store, is planning to open a branch store across town. To do this, they must find someone to manage the new store. The manager's duties will include ordering books from publishers, making certain there are enough books in stock, supervising and hiring staff, and maintaining and reviewing the financial statements. In addition, because this will be a small store, the manager will sometimes have to sell directly to the customers. **The Drums** is looking for someone who can perform all these functions and who is willing to work many long hours. The store will be open from 9 a.m. to 8 p.m. In the initial stages, the manager may have to be in the store, or on call, as long as it is open.

The starting salary for this position is $12,000. Promotional opportunities are good. The manager can either work towards making this branch grow, or eventually open new branch stores.

#5 XYZ, Inc. — Department Store — Opening: Assistant Buyer, Book Department

XYZ, Inc. is a large, local department store, affiliated with a national company. It carries every line of goods imaginable, although its book department has not been as extensive as other departments.

XYZ seeks to hire a bright, young person willing to work hard toward expanding the department. The present opening is for an assistant buyer. The buyer of the book department has been with the company for twenty years, is sixty-one years old, and is scheduled to retire within four years. XYZ hopes to groom the Assistant Buyer to take over the Buyer's job and really make the Book Department a leading one in the city.

The starting salary is $13,000 per year with substantially higher earning potential for a person who becomes the buyer. The company wants a person who will be comfortable reporting to the present buyer and doing things his way for the present.

Overtime hours are required periodically, especially in the two months before Christmas. Travel for 3-5 days per month can be expected.

#6 Historical Society — Opening: Brochure Writer

In connection with the town's bicentennial, the local Historical Society received a grant to produce a visitor's guide to the town. The guide must describe the town's historic spots and also its tourist facilities – hotels, motels, restaurants, night spots, theatres and so forth. In a sense, the brochure will be advertising for the town.

The President of the Historical Society is recruiting three writers to produce the brochure. Maps and illustrations will be included in it. The individuals hired must know history, the town, and, of course, be skilled writers and illustrators.

The job is temporary – it will last for a year, until the guide is complete. The salary is $8,000 for the year. A fair bit of overtime may be required, because the Guide must be complete by the end of the year, no matter how much time it takes to get it done.

ROLE PLAY

Instructions to All Students

The object of this second exercise is to select jobs which would be most satisfying to two fictitious people. To do so, you will have to consider what the person likes to do, what type of life he/she wishes to lead, etc. You will also have to examine the jobs described to decide if and how they satisfy these interests.

You may not be able to satisfy *all* interests and preferences. You may have to choose a job which satisfies most interests or satisfies the most important ones.

1. Each of you will play the role of a person looking for a job, a job seeker, and of a person assisting the job seeker in selecting the most satisfying job, a counselor.
2. The teacher will tell you who will act as counselor and as job seeker first. You will switch roles after one round.
3. Take a few minutes to read your own instructions and your own profiles.
4. After examining your biographical sketch, you explain your preferences and interests to the counselor based on that sketch. Remember that you are to act as the person described in the sketch, even if you personally have different preferences.
5. The counselor should explain the various jobs to the job seeker.
6. Together you should select the job most likely to provide personal satisfaction to the job seeker as described in the biographical sketch. Evaluate each and state the reasons why it would or would not satisfy the individual.

Then you will switch roles. The new "job seeker" will use a new biographical sketch. A new counselor will consider three different job profiles. The same process is repeated.

Instructions to Counselor

1. You are to act as a job counselor to a person seeking employment.
2. In this role, you will have to describe the job openings (attached) to the job seeker. The job seeker will not have a copy of the job openings so he/she will not know what jobs are available until you tell him/her.
3. Include in your description the nature of the company; the type of position open; the type of person they are looking for; and characteristics of the job such as, how many overtime hours are required.
4. You and the job seeker, together, must decide which job would suit the job seeker best.
5. In matching, you must help the job seeker to decide what is most important to him/her. For example, is he/she most interested in making money or in being able to stay close to home?

Instructions to Job Seekers

1. You are to act as a person seeking employment. You must act as the person described in your job profile and not as yourself.
2. Explain to the job counselor your background, your career objectives, your outside interests, and any personal problems which might affect the type of job you want. The job counselor will not have a copy of the individual biographical sketches, so he/she does not know who you are until you tell him/her.
3. You and the job counselor, together, must determine the job which will be most satisfactory to you.
4. In matching, you must decide what elements are *most* important to you. For example, are you more interested in having evenings free or concerned about promotions?

Chris #3

You are an extremely artistic and creative individual. You attended college and received a degree in liberal arts, majoring in American History and Art. You taught History and English in junior high school for six years. You spent your spare time in creative activities such as writing short stories, photography and in oil paintings. You have been known to stay up until three in the morning, preceding a work day, exercising your artistic talents. You believe that a job must either stimulate your creative desires or allow sufficient spare time to pursue your creative interests on your own. You are unsure about your career objectives since your interests are so varied.

JOB OPENINGS

#1 Historical Society **Opening: Brochure Writer**

In connection with the bicentennial, the local Historical Society received a grant to produce a visitor's guide to the town. The guide must describe the town's historic spots and also its tourist facilities – hotels, motels, restaurants, night spots, theatres and so forth. In a sense, the brochure will be advertising for the town.

The President of the Historical Society is recruiting three writers to produce the brochure. Maps and illustrations will be included in it. The individuals hired must know history, the town, and, or course, be skilled writers and illustrators.

The job is temporary – it will last for a year, until the guide is complete. The salary is $8,000 for the year. A fair bit of overtime may be required, because the Guide must be complete by the end of the year, no matter how much time it takes to get it done.

#2 Avant Art Gallery **Art Gallery** **Opening: Sales Clerk**

Avant Art Gallery is a small new local gallery which carries the works of local artists. Paintings, drawings, sculptures and hand-crafted jewelry are sold at the Gallery. It is located in a regular commercial section of town, because the owner/manager hopes to attract customers into the Gallery when they are doing their regular shopping.

The owner of the Gallery, when it first opened, did everything herself. Now, she feels confident enough that the Gallery will succeed that she has decided to hire a sales clerk. She can't afford to pay very much – the salary is $6,000 per year. She hopes applicants for the job really enjoy art so they can converse with customers and also with her. (It is lonely in the shop when no customer is in.)

The Avant Art Gallery was started on a shoe-string. Most of the art there is on consignment – that means that the Gallery owner did not buy it. If she sells it, the artist gets paid and then the Gallery takes a fee.

#3 Look Here **Photo Studio** **Opening: General Manager**

Look Here photo studio is looking for a new general manager. **Look Here** is a medium-sized studio which specializes in innovative approaches in family portraits and group special occasions (weddings, graduations, parties and so forth). The new manager will be responsible for greeting customers and taking their orders, supervising the studio's five photographers, developing prints and designing interesting backdrops for indoor photographs, and occasionally doing some photography. The starting salary will be $13,500. No overtime is required.

Jo #4

You recently had to close your butcher shop. It was a neighborhood store which you owned and ran for eight years. Recently, however, two large supermarkets moved into the area and since then you have been losing money. You prefer to work alone, and you are looking for a job that will permit you to do that. You would like to remain in the same line of work. You spend a lot of time at sports. These sporting activities include membership in a bowling league and softball when the weather permits. You are married and have three children. Because of your interest in sports, you spend most weekends and evenings teaching and playing sports with your children. You can't afford to be out of work for long and you need to earn at least $15,000 to support your family. You would definitely like to have your evenings and weekends free in order to continue to spend time with your family. You believe that that is more important than money – or much else.

#1 Mighty Burger, Inc. Restaurant Chain Opening: Checker

Mighty Burger, Inc. is a nationwide restaurant chain, well-known for its fast service and excellent hamburgers. Its menu is limited, like most fast-food operations, but its service and quality of food rate high.

The company needs a new checker for this area. The checker will cover a territory of 100 miles. The job requires that the checker visit each local restaurant, and order a meal like any other customer, to check the quality of the service and of the food served. The checker does not, of course, have to eat a complete meal in every place he checks. The company will train the checker in what characteristics to look for, and how to check out the quality of food without eating every last morsel.

The starting salary is $13,000. Rarely does the checker need to stay in an area over night. Most trips he can make in a day's time and still cover the whole territory every month.

He must file reports with the company's branch office. Sometimes, these have to be done after daytime hours if the checker has spent a lot of time traveling that day.

#2 Sports Unlimited Wholesale Store Opening: Sales Representatives

Sports Unlimited is a wholesale store which supplies sporting goods to retailers. Their products include tennis equipment, ice skates, basketballs, footballs, etc. They are presently looking for a sales representative. Sports Unlimited does have a training program but it is not very extensive. It basically involves observing other salespersons with clients. The company prefers that its new employees know about sporting equipment – i.e., the advantages and disadvantages of a steel versus a wooden tennis racquet. But it will hire people who do not have this previous knowledge. It realizes its customers, the retailers, are quite knowledgeable about the products.

The hours for this job are 9 a.m. to 5 p.m. It never requires overtime. The starting salary is $11,500. The career ladders are well defined. The sales representative can advance from a small sales territory to a larger one, and from there to manager of a line of products (e.g., the line of football equipment).

#3 All Foods Supermarket Supermarket Opening: Meat Department Manager

All Foods Supermarket is a large supermarket in a suburban area. All Foods is looking for a new head for its meat department. The hours will be 3 p.m. – 11 p.m. The duties include supervising the employees in the meat department, checking the meat for quality and compliance with All Foods standards as it comes in, and assisting in the butchering of the meat for packaging. All Foods has excellent employee fringe benefits, including an outstanding family health insurance plan, good vacation benefits and a retirement plan. Starting salary is $15,000.

ACTIVITY B. *The Working Mother*

Interviewing Instructions

Explain to the interviewee that this interview is part of a class activity.

Explain the purpose of the exercise is to explore the needs of working women, especially those with children.

Be sure to thank the interviewee for giving her/his time.

Interview Questions: For Employers

Name and Position of Interviewee:____

Name of Company:____________________________ Type of Business:________

1. How many women do you employ?________________________________

2. Do many of these women have children of school age or younger?____________

3. Do you have any special policies toward women with families such as, special sick days when children are ill, arrangements for child care, part-time work, maternity leave, etc.?______________________________________
____

4a. If Yes: Why did you institute these policies?______________________

4b. If not: Why not?____

5. Do you prefer to hire single women?______________________________

6. Do you find women with children are absent more than other employees?________

7. Have you hired women who have come back to work after more than five years?
____

Interviewing Instructions

Explain to the interviewee that this interview is part of a class activity.

Explain the purpose of the exercise is to explore the needs of working women, especially those with children.

Be sure to thank the interviewee for giving her time.

Interview Questions: Ask Your Mother

1. How old are the children in the family?______________________________

2. Are you currently working outside the home?__________________________

IF WORKING OUTSIDE THE HOME

3. Full Time?______ Part Time?______

4. Job Title____

5. Why do you work?_______________________________________

6. What do you like most about your job?____________________________

7. What do you like least?____________________________________

8. What could your employer do to make it easier for you to combine work and home responsibilities?________________________ Does he?________

9. How does the family share in household tasks?________________________

10. Who cares for children while you are at work?________________________

IF NOT EMPLOYED

11. Why don't you hold a paid job?

______ Can't find part-time work

______ Don't want to work

______ Don't believe in working while children are young

______ Can't get babysitter

______ Husband wants me home

______ Can't find job I want

______ Can't commit myself to job because of illnesses of children, emergencies, etc.

______ Other

12. What was the paid job you last held?______________________________

13. Do you plan to go back to work?______ If so, when?____________________

14. If you were able to have any job you wanted, what type of job would you like to have?

UNIT 4: SELF-ASSESSMENT AND OCCUPATIONAL ANALYSIS

Student Materials

OVERVIEW

ACTIVITIES	MATERIALS
A. *The Future* Depict your ambitions for your future in collages and posters.	Magazines, scissors, glue, poster board.
B. *What Else Turns You On?* Choose appealing jobs from ads and consider what makes them attractive.	Classified advertisement pages from newspapers. Student Instructions and Job Activities and Products List
C. *Who Are You?* Assess your interests by examining how you actually spend your time and measure your skills by noting how qualified you are already for a variety of jobs.	Student Instructions, List of Interests, Preferences and Abilities, and Skills Identification
D. *Organizing for a Project* To organize a project, purposefully apply what you know about your own and your classmates' skills and interests.	

ACTIVITY B. *What Else Turns You On?*

Instructions

In this exercise you will be looking through advertised jobs to choose some which you would find exciting.

1. Circle the three jobs in the newspaper's classified advertisements that interest you most.
2. Make a list of 3 or 4 reasons why each of these jobs appeals to you. Some of the aspects of jobs which appeal to people include:

   variety
   salary
   challenge
   risk
   physical activity
   independence
   interesting product
   competition
   travel

3. Refer to your Job Activities and Products List (attached) and find the items which best describe the activities or the products involved in the jobs you have chosen. *Circle* these items. Add any other activities involved in the jobs you have chosen that do not appear on the list.
4. There may be additional activities and products on the Job Activities and Products List that you think you would enjoy. *Check* these activities.
5. When you are finished, discuss with the class your three job choices, your reasons, and the activities and products they involve.

JOB ACTIVITIES AND PRODUCTS LIST

From the activities and products listed below, find the words which best describe the jobs that interest you. Circle these and add any other activities or products which apply to the jobs you have chosen but which do not appear on the list.

Are there any additional action words which appeal to you? Put a check mark beside these even if they are not involved in the jobs you have chosen.

Ways of Interacting with People on the Job

____ listens
____ instructs
____ persuades
____ supervises
____ consults with/confers with
____ serves
____ recruits
____ interviews
____ hires
____ assists
____ advises
____ works for

Ways of Interacting with Things on the Job

____ demonstrates
____ moves
____ repairs
____ sells
____ operates
____ cleans
____ inspects
____ designs
____ constructs
____ installs
____ trims

Ways of Working with Ideas on the Job

____ designing studies
____ studying people's behavior
____ studying buying/financial trends
____ creating slogans
____ written or verbal advertising
____ designing art work
____ analyzing data
____ describing products

Other Activities

Products

____ automobiles
____ automobile parts
____ clothing
____ furniture
____ hardware
____ sporting goods
____ musical instruments
____ machinery
____ toys
____ food
____ photographic equipment
____ books
____ glassware
____ paper products
____ radios and televisions
____ audio equipment (stereophonic equipment)
____ records
____ home appliances
____ motorcycles
____ bicycles
____ aircraft
____ boats
____ pets

Other Products

ACTIVITY C. *Who are You?*

Instructions

What you do with your time reflects your interests and skills. In this exercise you will find out how you actually spend your time. You will also look at the many skills you already have. You almost certainly can do more than you realized.

You will see that you are even qualified already for many jobs. To see if you are qualified for a specific job, you will have to analyze what the jobs require.

1. Look at the List of Interests and Abilities and circle all the items that describe how you actually spend your time. Add others.
2. If you are not doing the things you want to do, indicate why in the space available on the bottom of the page.
3. When you have finished, you will discuss the way you spend time with the class.
4. After the class discussion, you will identify your skills. Use the Skills Identification sheet and check off the skills you have. Add others.
5. Then consider the following jobs:
   - ticket seller
   - parking lot attendant
   - cashier-clerk (in supermarket)
   - hotel clerk
   - automobile service station attendant

   Do you think you are qualified for any of them? What skills does each job require? Do you have any of these skills?

LIST OF INTERESTS AND ABILITIES

1. I prefer to spend most of my time: (✓ check)
   I actually spend most of my time: (○ circle)

indoors	outdoors
working with my hands	thinking
reading	being physically active
socializing	being by myself
with children	with people my own age
doing math	doing history

2. If the circles and checks are different, I am not doing the things I most want to do because:

SKILLS IDENTIFICATION

You have more skills and talents than you realize. Let's find out what some of those skills are. Below is a list of different types of skills. Check off and give examples of the ones you think you have. Also, in the 'other' category, add skills that you have which are not on the list.

Skills and Talents	Check	Examples
basic math		
reading		
writing		
organizational (for example, organizing activities such as parties, games; planning homework schedules)		
working with your hands (e.g., knitting, building model cars or airplanes, typing)		
ability to follow directions		
singing		
playing a musical instrument		
playing a school sport		
drawing		
child care		
household maintenance (e.g., lawn-mowing; cleaning)		
other skills:		
______________________		
______________________		

UNIT 5: EXPLORING BELIEFS AND VALUES IN CAREER DECISION-MAKING

Student Materials

OVERVIEW

ACTIVITIES	MATERIALS
A. *In the Interest of . . .* Role-play opposing positions of consumers and businesspersons around selected issues. In so doing, explore your own beliefs and values in terms of the respective rights and responsibilities of businesses, consumers and employees.	Role Profiles
B. *What Would You Do?* Examine dilemmas from the point of view of the individual decision-maker in marketing and distribution occupations.	4 situations descriptions

ACTIVITY A. *In The Interest Of . . .*

Instructions

First a single pair of students and then all pairs of students will role-play in a career situation involving personal beliefs and values. You will defend the position of an owner, consumer, or employee caught in a situation of conflict. Whatever your personal beliefs may be, try to understand and defend the position described in the situations. You will have a chance to express your own opinion in the Activity which follows.

ROLE PLAY # 1 CONSUMER PROTECTION

CONSUMER GROUP

You represent the Neighborhood Consumer Protection Federation, a group organized to protect the interests of consumers in your neighborhood. You have been picketing Joe's Emporium because of the shoddy quality of the merchandise he sells. Friends of yours have had many bad experiences with Joe's merchandise. One bought a bed for her children which collapsed one night, only two weeks after it was bought. Another bought some shoes which fell apart within a month (the sole actually fell off). A third neighbor bought an electric toaster which never made toast from the moment it was bought. All of these friends tried to return the merchandise, but were told by the people in the store, "All sales are final."

You are meeting with the management of the store this afternoon. In this meeting you would like to get his acceptance of your main demands, which are that he give at least a ninety-day guarantee on all his products, and that he allow them to be returned within two weeks of purchase for a complete cash refund. Your group feels that this is the minimum he can do to keep your confidence that he is selling quality merchandise. It's in his interest anyway since his business is bound to suffer as word gets around that the quality of his merchandise is so poor and that he allows no returns.

OWNER

You are the owner of Joe's Emporium, a discount store which has operated in the same neighborhood for twenty-five years. You have built up a strong reputation through aggressive discounting of merchandise. Your store is attractive, but has few of the frills that the high-price downtown department stores have. This has allowed you to keep costs low and therefore to keep your prices down.

In addition, you have worked hard to find low-priced goods that your customers can afford. This has meant that you have shopped around to find small manufacturers in the United States, and have imported a number of items from low-cost factories in Korea, Taiwan and Singapore. While the quality of some of these goods is not as high as the merchandise sold downtown, your prices are so much lower that you feel that your customers are still getting a good buy.

Recently, some neighborhood groups have been picketing your store, because of complaints that things they have bought from your store have broken as soon as they were taken home. They want you to improve the quality of your goods and to offer guarantees that the goods will not break within ninety days of purchase. You cannot do this without raising your prices more than you think the traffic will bear.

This afternoon, representatives from the Neighborhood Consumer Protection Federation are meeting with you to discuss their complaints.

ROLE PLAY # 2 CONSUMER PROTECTION

HEAD BUYER

You are the Head Buyer for the Shop Well Supermarkets. Your Product Manager for canned fruits and vegetables has complained to you about the fact that the Eat Rite canned fruits contain more juice than fruit, and he wants you to stop buying this line because he thinks that it is actually more expensive for the customers than the higher-priced R & W line. This is because the cans of Eat Rite fruit contain less fruit, even though the cans themselves are less expensive.

You feel that both lines should be offered to the customer. You know that many of your stores are in low-income neighborhoods, and that the customers in these stores tend to buy the food with the lowest price on the can, even if the quantity of food is slightly less than a higher priced item. If you stop selling Eat Rite Fruits, you feel sure that many of your customers will begin shopping at the discount supermarkets. You hope that your fruit and vegetable Product Manager will understand that the customers want both lines of canned fruit and will withdraw his request to drop the Eat Rite line.

PRODUCT MANAGER

You are the canned fruit and vegetable product manager for the Shop Well Supermarket chain. In your stores there are two lines of canned fruits: the R & W line, which is considered "regular" quality and average price; and the Eat Rite line, which sells for considerably less than the R & W line. The quality of the fruit is the same in these two lines, but the Eat Rite canned fruits sell for less because they contain less fruit and more juice.

You feel strongly that you should no longer buy Eat Rite fruits for your stores, since the amount of juice in the cans is so much that this line actually costs your customers more than the R & W line, in terms of the actual amount of fruit in a can. You think your customers would be better off buying the higher priced R & W fruits, because they would get more fruit for their money. You have mentioned your concerns to the Head Buyer, and he has arranged a meeting to discuss the problem. You hope that he will agree to stop buying the Eat Rite line.

ROLE PLAY # 3

ASSOCIATION OF CONSUMERS TO REPEAL FAIR-TRADE LAWS

You have arranged a meeting with the manager of the Centerville Home Appliance Center to try to persuade him to drop the Kitchen-Eeze line of electric appliances for the kitchen. You know that this store carries other lines, but every time you have tried to buy a toaster or a coffee maker from the store, the sales people have tried to persuade you to buy the higher-priced Kitchen-Eeze appliance.

You know that the Kitchen-Eeze appliances cost more because they are sold under the Fair-Trade Laws.* Your group is protesting stores which sell fair-traded items because you are convinced that the laws only result in higher prices for consumers. You want the Centerville Home Appliance Center to stop selling the Kitchen-Eeze line and to offer only non-fair-trade items, at prices comparable with other stores. You feel sure that this will result in lower prices, with no sacrifice in quality. At a minimum you would like the manager to promote the non-fair-trade lines, and to tell his sales people to recommend these other lines to customers, because of their lower prices.

STORE MANAGER

You are the manager of the Centerville Home Appliance Center. In your store you sell many different kinds of kitchen equipment, including pots and pans, electric appliances (toasters, coffee makers, and so forth), and other items for the housewife. Your main line of electric appliances is the Kitchen-Eeze line, which is sold under Fair-Trade Laws.* You push the Kitchen-Eeze line because the fair-trade prices guarantee you a higher profit on the appliance than you could get with other lines. You are satisified that Kitchen-Eeze is a high quality product, and the Kitchen-Eeze company has a good national reputation.

You also carry two other lines of electric appliances for those customers who insist on them, but you keep these lines in the back of your store and do not show them to customers unless the customer insists on buying something other than Kitchen-Eeze.

Recently a group called Association of Consumers to Repeal Fair-Trade Laws had been complaining to you that the fair-trade price on your Kitchen-Eeze line is too high and that you should stop selling that line. They feel that the other lines that you carry represent good quality at a lower price. Your own feeling is that you need the higher profit of the Kitchen-Eeze line to stay in business, and that anyway, the customer can always have another item if he insists. You are about to meet with this consumer group to discuss the issue.

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* Fair-Trade Laws allow a manufacturer to tell the retailer the lowest price that the retailer can charge for a product. In states which have Fair-Trade Laws, the retailer is not allowed to sell the product at a price lower than the price specified by the manufacturer.

ACTIVITY B. *What Would You Do?*

Instructions

Read the situations below and answer the questions from the viewpoint of each decision-maker.

Description of Situations

Situation 1

You have a fine reputation as the owner of the Playtime Toy Store which you have owned and run for 10 years. A consumer-interest group has just produced a report which is receiving national attention describing the hazards of numerous very popular toys. These toys could, or actually have seriously injured young children. Some have caused the loss of an eye; some have caused third-degree burns.

You carry many of the toys listed in this report.

- What action, if any, will you take?
- What is your responsibility to your customers? What is the responsibility of the Manufacturer?
- Would you work for this store?

Situation 2

You are the buyer for a large and reputable department store.

A consumer group has just visited you to urge you to stop selling a certain brand of children's night clothing. One of the members of this group is the parent of a child who suffered severe burns when her nightgown went up in flames. This group wants you to stop buying from the manufacturer who made this nightgown.

- What action if any, will you take?
- What is your responsibility as an employee? As an individual?

Situation 3

You have been working in the Soundcraft Stereo and Hi-Fi Store for the last six months. Recently, Supreme, a manufacturer of one brand of stereo equipment, offered the store's sales people a premium of $5.00 for each Supreme Stereo sold.

A customer walks into the store looking for a stereo set and asks for your recommendation. You would normally recommend the Acme Super Stereo, which you feel is the best unit in the customer's price range. Since you haven't had a sale all day, you are tempted to push the Supreme, so that you can get the premium money.

- What should you do?
- What is your responsibility to yourself? To your customer? To your employer?

Situation 4

You are the advertising copywriter for a major car dealer. Your job consists of writing copy for the dealer's advertising in the local newspapers. In this job you receive suggestions from the advertising department of the automobile manufacturer whose cars you sell. These suggestions are intended to keep the local advertising consistent with the manufacturer's national advertising theme.

The most recent suggestion you received suggests a theme which stresses that your cars, which are full-sized American sedans, can go farther on a tank of gasoline than the leading imported small car. You are further advised that the copy should state in a footnote that the car you are advertising has a gas tank which holds more gasoline than the import. This footnote is required to insure that you do not violate federal truth-in-advertising regulations.

- Do you think that this advertisement complies with the federal laws?
- Do you think that the suggested footnote complies with the spirit of the regulations?
- Would an advertisement such as the one suggested be misleading to consumers?
- Would you follow the manufacturer's recommendations for this advertising?
- What is your responsibility to yourself? To your employer? To the public?

UNIT 6: THE ROLE OF MARKETING AND DISTRIBUTION IN THE ECONOMY

Student Materials

OVERVIEW

ACTIVITIES	MATERIALS
A. *Overview of the Marketing and Distribution Process*	
Learn basic ideas and concepts by exchanging goods in class.	Information Sheet
B. *Channels of Distribution*	
Study channels of distribution and put in sequence business functions from production to consumption.	Information Sheet; Exercise
C. *I'll Buy It*	
Move a product from producer to consumer in a walk-through exercise in class in which teams perform marketing and distribution functions.	
D. *Simulation*	
Create your own economic system to learn possible routes for moving a raw material in the hands of a producer to a finished product in the hands of a consumer.	SIMULATION PACKET

ACTIVITY A. *Overview Of The Marketing and Distribution Process*

Marketing and distribution occupations are uniquely defined by their role in the economy. They are those occupations concerned with bringing goods and services from producers to the final consumers. The marketing and distribution occupations all contribute to this flow.

The marketing and distribution occupations are concerned with the processes of getting products or making services available to the consumer. They facilitate the distribution of goods from many different manufacturers to many different final consumers. They may sell products directly – for example, the occupations in industrial, wholesale, and retail selling – or they may be occupations which service the selling occupations – such as finance, advertising, or market research – or they may provide a service directly to the consumer – such as lodging facilities and real estate services. In one way or another, all of the marketing and distribution occupations are concerned with filling the distribution "pipeline" between the producer and the consumer.

The distribution of goods from producer to consumer involves the process of physical distribution along some steps of the distribution chain – from producer to wholesaler to retail store to consumer. At each of the steps in the distribution process there must occur another activity, namely, an *exchange* between the buyer and the seller.

The fundamental economic transaction involves exchange of goods or services between two parties to the transaction. Each party to a transaction has goods or services the other party wants; each party to a transaction wants goods or services the other party has. The process of exchange is central to the operation of all societies.

The most basic kind of exchange is a barter arrangement, such as a farmer exchanging some of his crops for the services of a blacksmith. A more complex exchange occurs when many producers/sellers and many buyers come together at a bazaar or other central trading place to exchange goods. As the system develops, a middleman – retail merchant – is introduced between the buyer and the seller. This middleman buys from many producers and sells to many buyers. His function is to make the distribution of goods easier for both the seller and buyer. His occupation may be defined as marketing and distribution. It is a short step from this single middleman to more elaborate and complex distribution processes, where many goods produced by many manufacturers, at great distances from one another and from the many individual consumers, are distributed through several series of middlemen until they reach the ultimate consumer. These middlemen include salespeople, wholesalers, and jobbers, warehouse operators, transportation specialists, and retailers.

ACTIVITY B. *Channels of Distribution*

The route that a product follows from the manufacturer to the consumer is called a channel of distribution. As goods travel from the manufacturer to the consumer, there are a number of establishments that may be involved. Certainly you are familiar with the retailer who sells directly to the consumer. *Wholesalers* generally buy from the manufacturer and sell to the retailer. *Brokers* assist in the transfer from one institution to the next. For example, a broker may arrange a sale of products from the manufacturer to the retailer or from the manufacturer to the wholesaler. Let's now take a look at some of the typical channels of distribution.

Manufacturer to Consumer. When you buy products from a door-to-door salesperson who represents a manufacturer, the manufacturer is marketing directly to the consumer. No middleman, such as the retailer or wholesaler, is involved. Encyclopedias are sometimes sold this way.

Manufacturer to the Retailer to the Consumer. In some industries, such as the fashion industry, the manufacturer markets directly to the retailer who displays and sells the product to the consumer.

Manufacturer to the Wholesaler to the Retailer. In industries where there are a large number of retail stores selling similar products, the manufacturer may not sell directly to the retailer but will sell directly to wholesalers. The wholesaler will in turn market to many retailers.

Manufacturer to Broker to Wholesaler to Retailer. For some commodities, such as food and petroleum items, a broker may be used to locate supplies of the items needed. The broker then arranges for shipment to the wholesaler, who in turn markets to the retailer.

The selection of the appropriate channel is an important marketing decision. Many people think that if one or more of the middlemen in the channel were eliminated, the price of goods would go down. However, this is not necessarily true since each of these middlemen performs a valuable service in the marketing and distribution of goods and services. Even if the middleman is not there, the service still must be performed by someone else.

CHAIN OF DISTRIBUTION CHART

Farmer grows wheat
PRODUCER

Trucker transports wheat*
TRANSPORTER

Grain elevator stores wheat*
WHOLESALER

Wheat is milled into flour
PROCESSOR

Flour is transported to baker*
TRANSPORTER

Baker makes bread from flour
PROCESSOR

Baker displays bread for sale*
RETAILER

Bread is transported to supermarket*
TRANSPORTER

Supermarket displays bread for sale*
RETAILER

Consumer purchases bread
CONSUMER

*Marketing and distribution activities

Exercise: Channels of Distribution

1. Match the name of the business in Column I which performs the function listed in Column II. Write the letter of the function next to the name of the business.

I. Business which Performs Function

Oil Industry

1. Shipping Company__________
2. Oil well operator__________
3. Tank truck__________
4. Gas station__________
5. Refinery__________

Bread Industry

1. Grocery store__________
2. Railroad__________
3. Wheat farmer__________
4. Trucking Company__________
5. Baker__________
6. Grain dealer__________

II. Name of Function

A. Wholesaler
B. Producer
C. Transporter
D. Retailer
E. Processor

2. Write the numbers of the businesses from Column I in order of the distribution sequence for the oil industry, i.e. which business would handle the product first, which second, and so forth.

3. Write the numbers of the businesses from Column I in order of the distribution sequence for the bread industry, i.e. which business would handle the product first, which second, and so forth.

UNIT 7: OVERVIEW OF THE FIELD OF MARKETING AND DISTRIBUTION

Student Materials

OVERVIEW

ACTIVITIES	MATERIALS
A. *What is Marketing and Distribution About?* Learn the industries, functions and operations which comprise the field of Marketing and Distribution.	Student Information Sheet and Cluster Diagrams and Guide.
B. *A Look at Marketing and Distribution Occupations* Identify characteristics of occupations in the field of Marketing and Distribution.	Three matching exercises
C. *Who is the Consumer?* Identify the consumer that a variety of Marketing and Distribution businesses serve.	One matching exercise
D. *If You're in a Hurry* Identify different businesses which meet different consumers' needs and preferences.	One matching exercise
E. *We've Got One Right Here in Town.* Prepare a Guide for new residents to the Marketing and Distribution businesses in the local community, based on a "walking tour" and/or use of directories.	Instructions and "Taking Notes" Information Form; Yellow Pages; newspapers.

ACTIVITY A: *What is Marketing and Distribution About?*

Instructions

Read the Information Sheet below on **The Field of Marketing and Distribution** which describes the functions performed by employees in the field and defines the industries in Marketing and Distribution. Then, read Guide to the Cluster Diagram to help you explore in detail the industries, functions and occupations in Marketing and Distribution. The industries are grouped into six subclusters according to the basic human needs they satisfy. The diagram shows examples of occupations responsible for performing each marketing function. A successful employee in marketing and distribution must know about the industry he/she works in, its product or service, and the marketing function he/she performs. The Cluster Diagram summarizes industries, occupations and functions to give you an overview of the many and different types of activities in marketing and distribution.

THE FIELD OF MARKETING AND DISTRIBUTION

Over one-third of the people employed in the United States are employed in marketing and distribution occupations. These occupations are concerned with the process of directing the flow of goods and services from the producer to the consumer. The consumer may be an individual or another business establishment.

Everyone comes into contact with marketing and distribution businesses and employees. Everything that you purchase from candy bars to clothing comes from businesses involved in marketing – to you. Each of these businesses specializes in certain goods or services and each business performs marketing functions in order to market to you and other consumers successfully. It *buys* goods; *promotes* them by publicizing and displaying them; figures out who is most likely to buy what products (market research); *sells* to you; and manages money, people, and things so that the product or service is available when and where you want it.

MARKETING AND DISTRIBUTION FUNCTIONS

Selling is concerned with assisting or convincing the consumer to make a purchase. It may involve providing the customer with product information or assisting the customer in selection of appropriate merchandise. Individuals in selling occupations are employed in all industries. If you are interested in selling, you could sell to consumers in a retail store, you could work for a manufacturer selling to wholesalers and retailers, or you could sell directly to consumers in their homes.

Buying is concerned with securing merchandise for resale or for use in making goods or in providing services. You have certainly seen racks of clothing in stores, shelves of food, and walls of shoes. Have you ever wondered who decided which merchandise should be in the store? This is the responsibility of buyers who purchase merchandise for the store for resale. Buyers are also employed by wholesalers and other establishments in the marketing process. Buyers must keep abreast of current developments in the fields they buy for. For example, buyers of apparel must be current on the latest fashion trends.

Sales Promotion is concerned with supporting the sale of goods and services. Whereas sales involves direct consumer contact, sales promotion involves those activities which support direct sales activities. The advertising you see in magazines, the window and counter displays in stores and the special fashion promotions are examples of sales promotions activities. People who perform these activities assist in the preparation of advertisements in various media, displays, promotional campaigns and publicity releases.

Market Research is concerned with obtaining information which provides the basis for many marketing decisions. All these decisions might include whether or not to stock a new product, how to package a new product, whether locating a new store in a shopping center in the suburbs or downtown in the city will attract more customers, whether consumers are satisfied with the services of the business or have suggestions for improvement. People employed in market research study customer preferences, reactions, and spending habits. This information helps a business serve the consumer and thereby enhances the success of the business.

Management is concerned with the organization of people and money and things. Managers are employed in every aspect of marketing and distribution, making decisions about policy, organization, personnel, financing, and all aspects of a business. Individuals generally attain a position in management after experience in another marketing function in the industry. Some managers are trained especially for such positions in two- or four-year colleges.

MARKETING AND DISTRIBUTION INDUSTRIES

Many industries are involved in marketing and distribution of goods and services to the consumer. These industries can be grouped broadly under six headings or subclusters according to the kinds of product or service they provide. Below are brief descriptions of each of the nineteen industries engaged in marketing and distribution. These nineteen represent nearly all of the businesses engaged in marketing and distribution.

FASHION MERCHANDISE SUBCLUSTER

Apparel and Accessories. This industry is concerned with marketing activities in retail and wholesale establishments primarily engaged in marketing clothing and accessories of all kinds, including jewelry.

General Merchandise. This industry is concerned with marketing in stores which feature a wide range of merchandise such as department stores, discount stores and variety stores.

BUSINESS AND FINANCIAL SERVICES

Advertising Services. This industry is concerned with creating advertising and sales promotion programs utilizing displays, merchandise ads, and mass media in such enterprises as advertising agencies and display houses.

Finance and Credit. This industry is concerned with banking services, services connected with the exchange of securities, and extending credit to consumers.

Industrial Marketing. This industry is concerned with the marketing of equipment and supplies to businesses and institutions for use in manufacturing, business, and professional activities.

Insurance. This industry is concerned with the marketing of insurance agreements for minimizing risks to individuals, businesses, and public agencies.

International Trade. This industry is concerned with the importing and exporting of goods and making the arrangements necessary to accomplish imports and exports.

PROPERTY AND HOME-RELATED ITEMS

Real Estate. This industry is concerned with the marketing of homes, land and industrial property to prospective buyers.

Home Furnishings. This industry is concerned with the marketing of items for the inside of the home such as draperies, carpeting and furniture.

Hardware, Building Materials, Farm and Garden Supplies and Equipment. This industry is concerned with the marketing of hardware, farm and building supplies and equipment to individuals, retailers, wholesalers, contractors, and farmers.

FOOD DISTRIBUTION

Food Distribution. This industry is concerned with the marketing of food items in grocery stores, supermarkets, and specialty food stores.

SERVICES FOR PERSONAL NEEDS

Food Services. This industry is concerned with the serving of food and beverages to customers.

Hotel and Lodging. This industry is concerned with the marketing of lodging facilities to the consumer.

Recreation and Tourism. This industry is concerned with the marketing of those activities that will assist the consumer in enjoyment of his/her free time.

Personal Services. This industry is concerned with marketing those activities that will assist the consumer in improving his or her appearance and health.

Floristry. This industry is concerned with the marketing of flowers and plants.

TRANSPORTATION SERVICES SUBCLUSTER

Automotive. This industry is concerned with the marketing of automobiles and other vehicles, such as trucks and trailers and related services, such as parking, rental agencies and car washes.

Petroleum. This industry is concerned with the marketing of fuel items for automobiles and other vehicles.

Transportation. This industry is concerned with marketing the services of means of transportation usch as airplanes, boats and railroads.

GUIDE TO CLUSTER DIAGRAMS

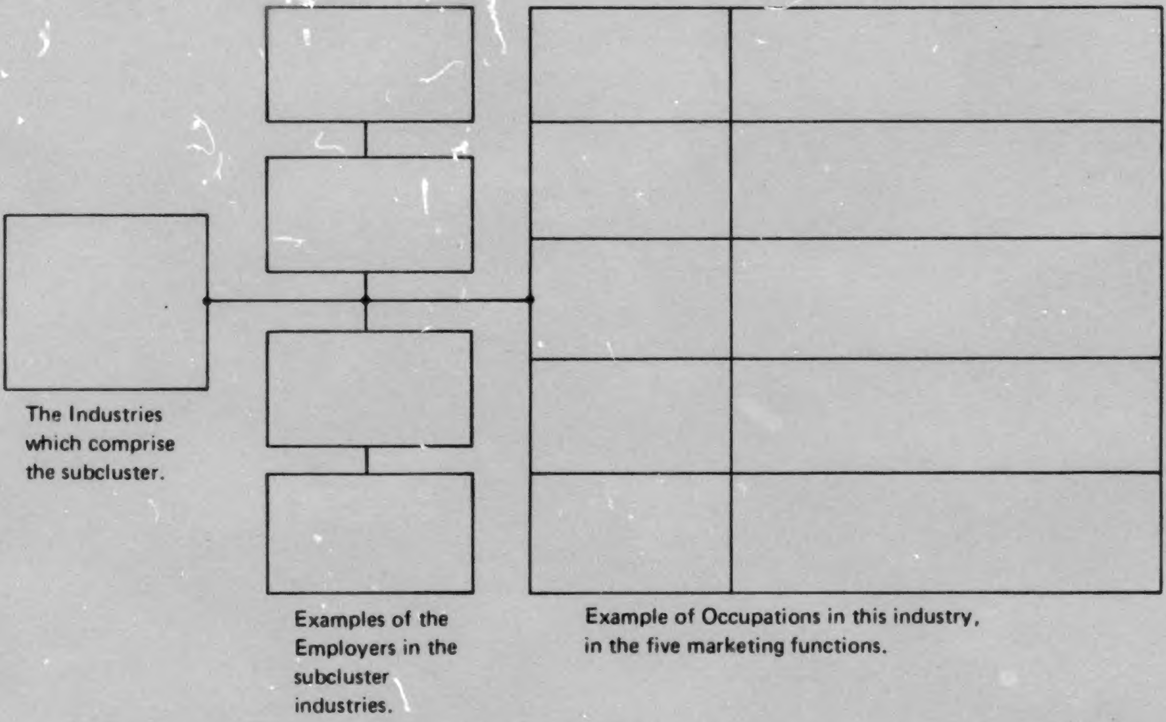
Marketing and Distribution is a diverse field, employing tens of millions of people. To assist you in examining what Marketing and Distribution consists of, the industries and occupations have been clustered (grouped) according to the products and services they provide to satisfy consumer needs.

Marketing and Distribution can be divided into six subclusters:

- Business and Financial Services
- Fashion Merchandise
- Property and Home-Related Items
- Services for Personal Needs
- Food Distribution
- Transportation Services

A diagram is provided for each of these subclusters.

Each diagram provides:

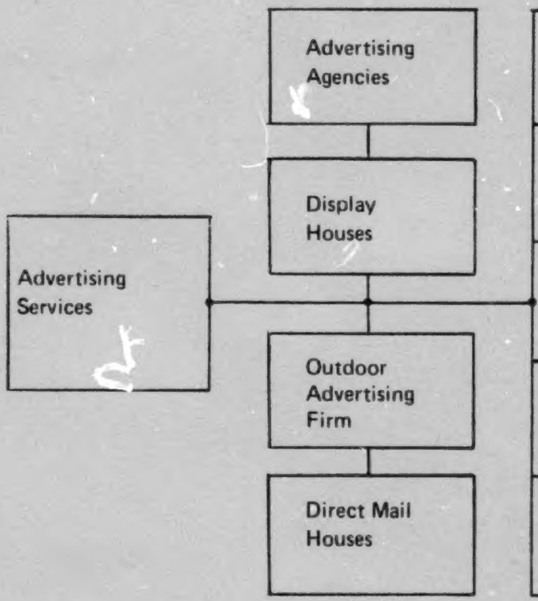

The Industries which comprise the subcluster.
Examples of the Employers in the subcluster industries.
Example of Occupations in this industry, in the five marketing functions.

At the top of each of the cluster diagrams is a brief description of the industries and occupations within the subcluster. In order to begin to identify occupations which are of interest to you, you should review the subcluster descriptions and read over the industries, employers and occupations within each of the subclusters. You may be able to identify additional employers and occupations.

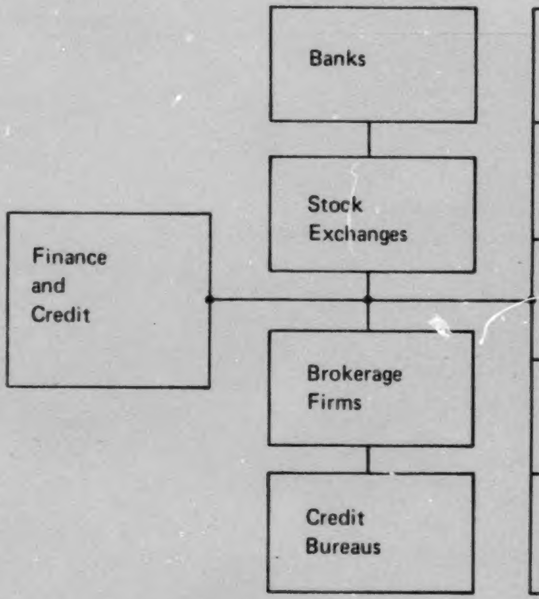
The occupations within each industry are identified by marketing and distribution function. Therefore, if you think you may be interested in an occupation related to buying, you could consult the box in each diagram labelled "buying". In this way, you can identify the large number of occupations related to that function.

BUSINESS AND FINANCIAL SERVICES

The Business and Financial Services subcluster includes all of those occupations which provide financial and business services. People employed in this subcluster work for advertising agencies, banks, credit bureaus, insurance companies and companies involved in international trade. Some of the occupations in this subcluster include insurance agent, advertising executive, bank teller, customs house broker, and industrial market salespersons. These occupations are concerned with providing services to businesses and individuals.

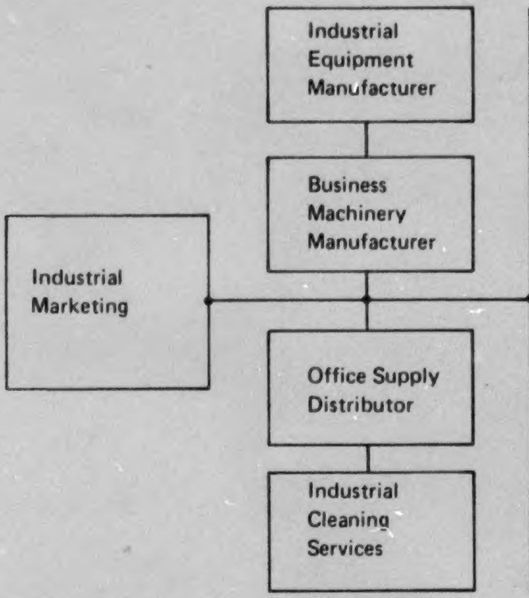

Advertising Services
Advertising Agencies
Display Houses
Outdoor Advertising Firm
Direct Mail Houses

SELLING	Account Executive T.V. Time Salesperson
BUYING	Media Buyer Display Supplies Buyer
SALES PROMOTION	Direct Mail Specialist Display Person
MARKET RESEARCH	Motivation Researcher Media Researcher
MANAGEMENT	Account Supervisor Display Manager

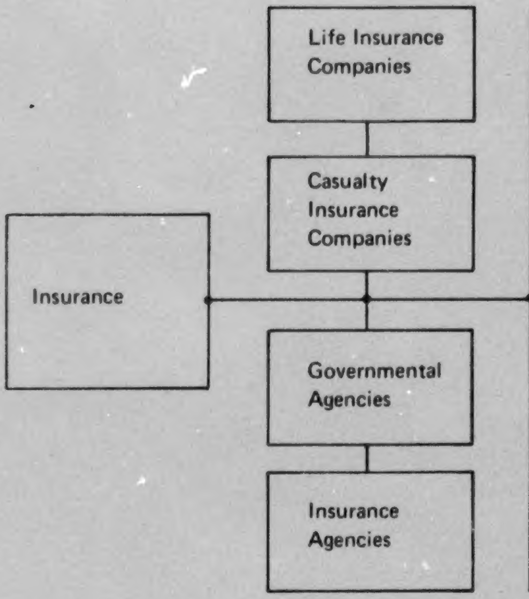

Finance and Credit
Banks
Stock Exchanges
Brokerage Firms
Credit Bureaus

SELLING	New Accounts Teller Stockbroker
BUYING	Securities Trader Broker's Floor Representative
SALES PROMOTION	Sales Promotion Manager Head of Public Relations
MARKET RESEARCH	Credit Analyst Financial Analyst
MANAGEMENT	Manager of Credit Bureau Bank President

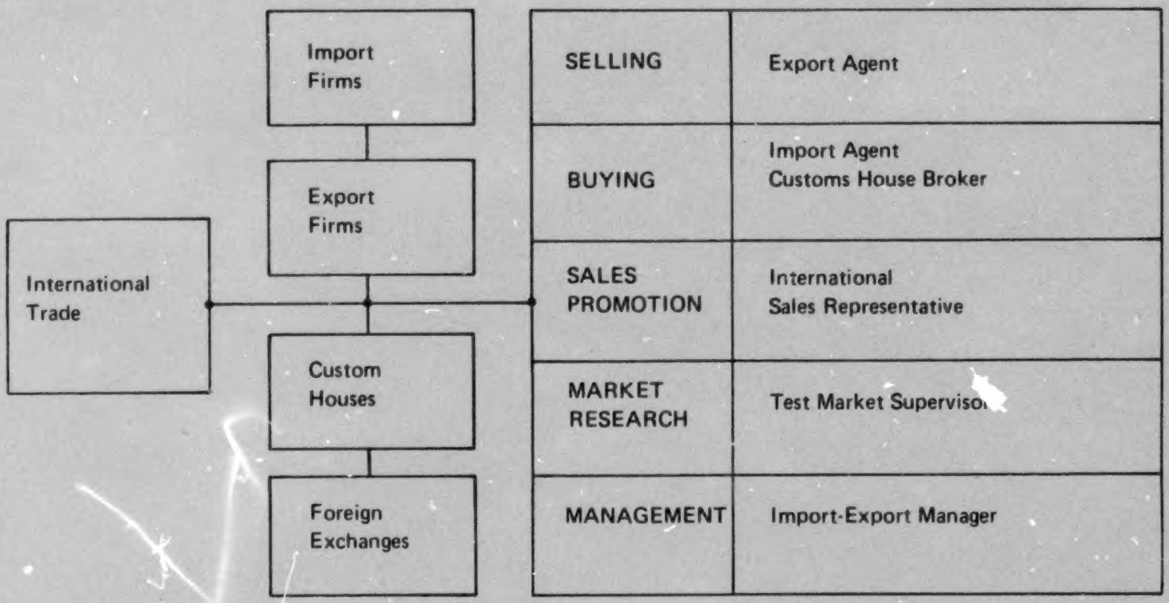
BUSINESS AND FINANCIAL SERVICES


Industrial Marketing
Industrial Equipment Manufacturer
Business Machinery Manufacturer
Office Supply Distributor
Industrial Cleaning Services

SELLING	Manufacturer's Representative Equipment Salesperson
BUYING	Communication Equipment Buyer Textile Machinery Buyer
SALES PROMOTION	Institutional Advertising Director Trade Show Display Designer
MARKET RESEARCH	Sales Forecaster
MANAGEMENT	Industrial Sales Manager Product Manager


Insurance
Life Insurance Companies
Casualty Insurance Companies
Governmental Agencies
Insurance Agencies

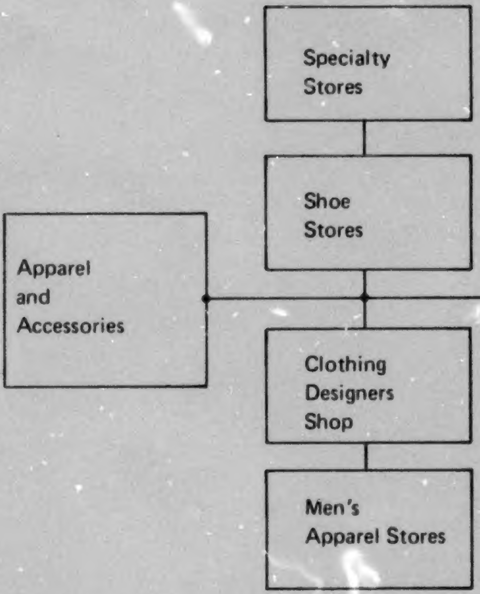
SELLING	Insurance Salesperson Group Insurance Salesperson
BUYING	Insurance Placer Estate Planner
SALES PROMOTION	Advertising Promotion Manager
MARKET RESEARCH	Insurance Investigator Sales Forecaster
MANAGEMENT	Insurance Sales Manager Insurance Office Manager


International Trade
Import Firms
Export Firms
Custom Houses
Foreign Exchanges

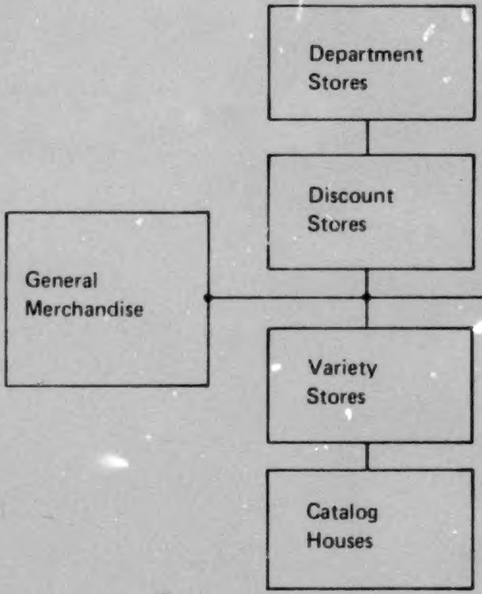
SELLING	Export Agent
BUYING	Import Agent Customs House Broker
SALES PROMOTION	International Sales Representative
MARKET RESEARCH	Test Market Supervisor
MANAGEMENT	Import-Export Manager

FASHION MERCHANDISE

The Fashion Merchandise subcluster includes those occupations involved in the marketing of clothing and general merchandise items. People employed in this subcluster work in stores such as specialty stores, clothing stores, department stores, discount stores, and shoe stores. You have probably observed employees of this subcluster in the department and discount stores in your downtown area or at the local shopping centers. In addition, many of the people employed in this subcluster are employed by manufacturers of apparel and general merchandise and are concerned with marketing to discount and department stores. Another large group of people are concerned with the purchasing of merchandise for the stores that you are familiar with. This latter group includes buyers, merchandise managers, and fashion coordinators.


Apparel and Accessories
Specialty Stores
Shoe Stores
Clothing Designers Shop
Men's Apparel Stores

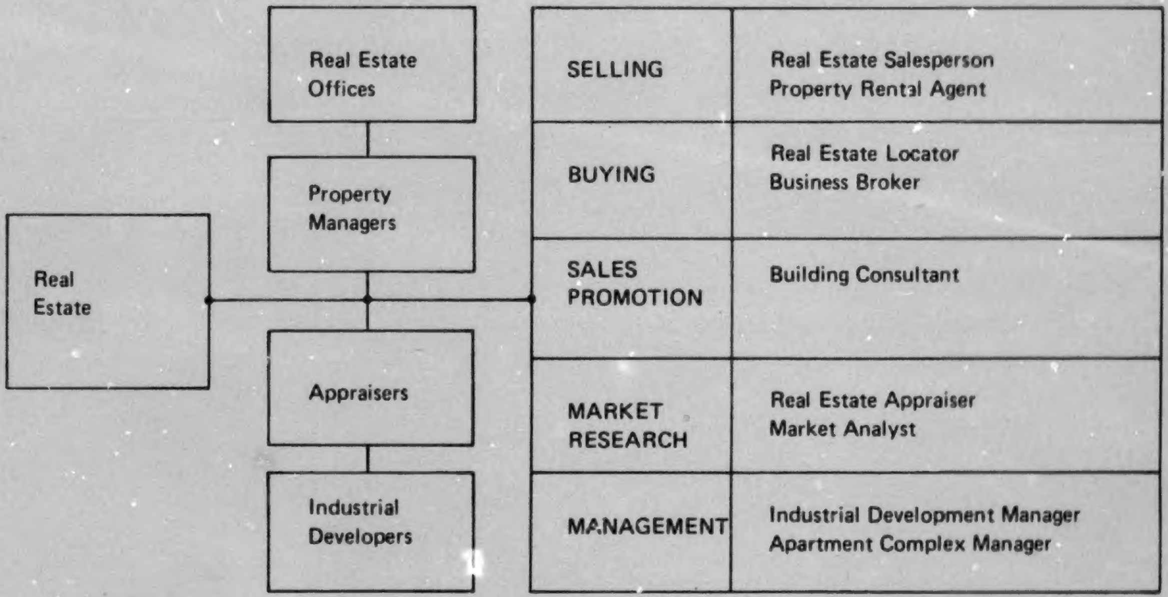
SELLING	Fur Salesperson Jewelry Salesperson
BUYING	Leather Goods Buyer Merchandise Manager
SALES PROMOTION	Fashion Coordinator Display Specialist
MARKET RESEARCH	Customer Interviewer Sales Analyst
MANAGEMENT	Men's Department Head Store Manager


General Merchandise
Department Stores
Discount Stores
Variety Stores
Catalog Houses

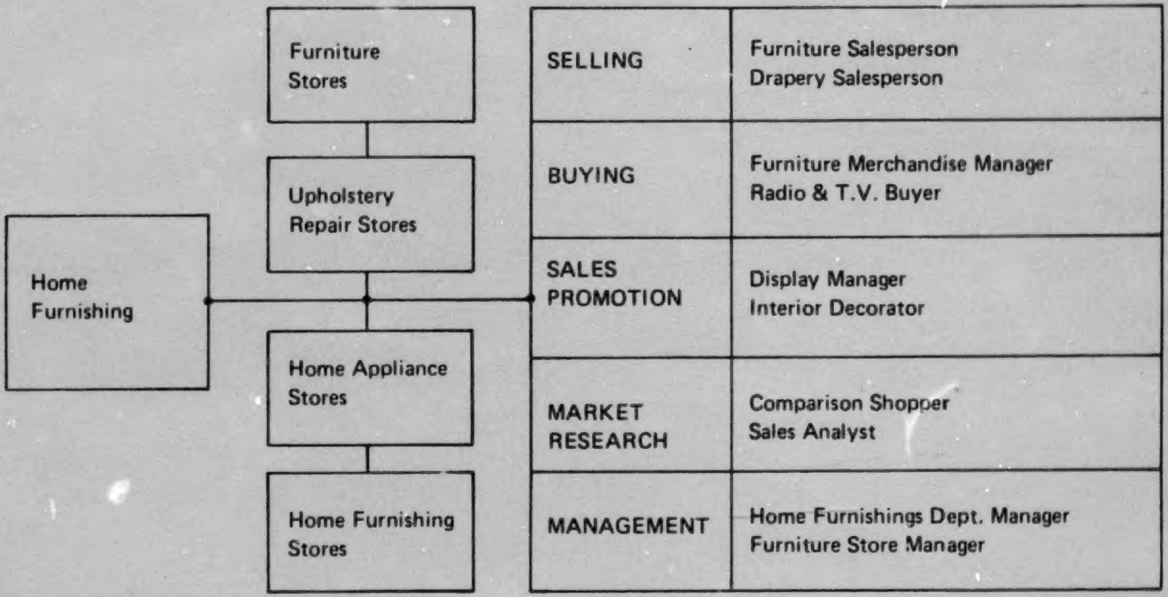
SELLING	Cashier China & Glassware Salesperson
BUYING	Silverware Buyer Gift Buyer
SALES PROMOTION	Bridal Consultant Cosmetic Demonstrator
MARKET RESEARCH	Comparison Shopper Sales Analyst
MANAGEMENT	Store Manager Customer Service Manager

PROPERTY AND HOME-RELATED ITEMS

This subcluster includes those occupations involved in the marketing of homes and home-related items. The employers in this field include real estate agencies, furniture stores, upholstery repair stores, and hardware stores. Examples of occupations are general hardware buyer, apartment complex manager, furniture merchandise manager and drapery salesperson.

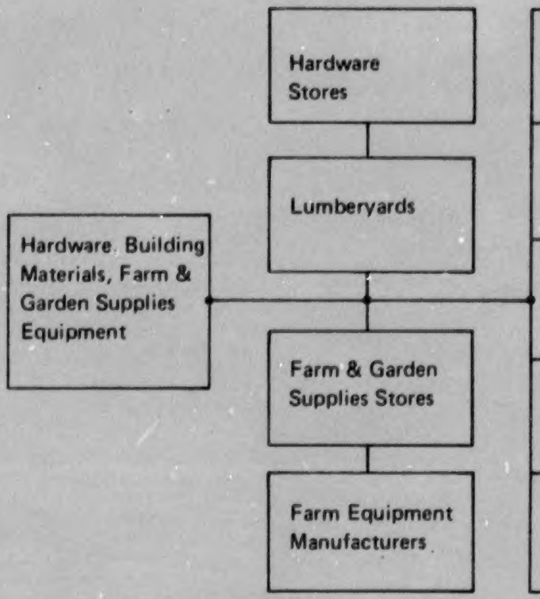

Real Estate
Real Estate Offices
Property Managers
Appraisers
Industrial Developers

SELLING	Real Estate Salesperson Property Rental Agent
BUYING	Real Estate Locator Business Broker
SALES PROMOTION	Building Consultant
MARKET RESEARCH	Real Estate Appraiser Market Analyst
MANAGEMENT	Industrial Development Manager Apartment Complex Manager


Home Furnishing
Furniture Stores
Upholstery Repair Stores
Home Appliance Stores
Home Furnishing Stores

SELLING	Furniture Salesperson Drapery Salesperson
BUYING	Furniture Merchandise Manager Radio & T.V. Buyer
SALES PROMOTION	Display Manager Interior Decorator
MARKET RESEARCH	Comparison Shopper Sales Analyst
MANAGEMENT	Home Furnishings Dept. Manager Furniture Store Manager

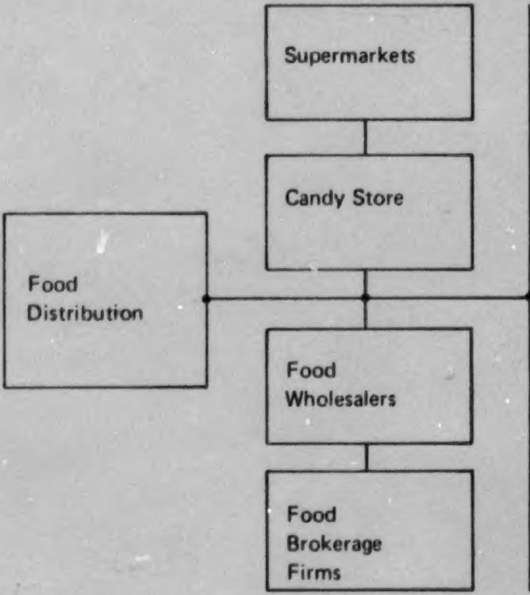
PROPERTY AND HOME-RELATED ITEMS


Hardware Building Materials, Farm & Garden Supplies Equipment
Hardware Stores
Lumberyards
Farm & Garden Supplies Stores
Farm Equipment Manufacturers

SELLING	Construction Machinery Salesperson Poultry Equipment Salesperson
BUYING	General Hardware Buyer Poultry Equipment Buyer
SALES PROMOTION	Product Demonstrator Display Supervisor
MARKET RESEARCH	Shopping Observer Market Analyst
MANAGEMENT	Lumberyard Supervisor Rental Equipment Manager

FOOD DISTRIBUTION

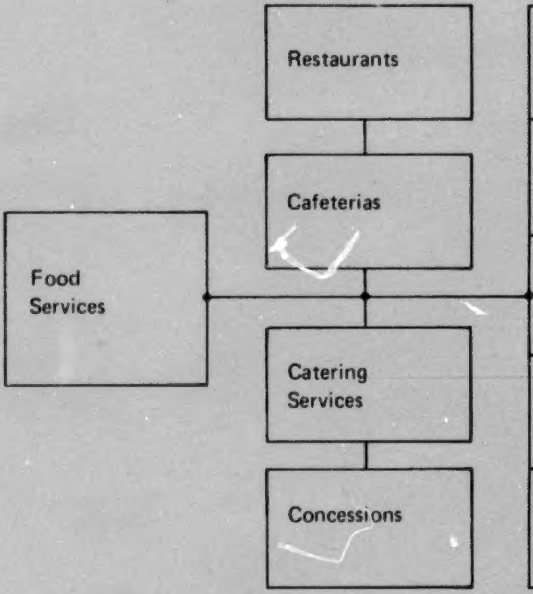
This subcluster includes those occupations involved with the marketing of food items. The employers of this subcluster include supermarkets, grocery stores, food wholesalers. Examples of occupations in this subcluster are food brokers, meat buyers, food demonstrators, display supervisors, and supermarket managers.


Food Distribution
Supermarkets
Candy Store
Food Wholesalers
Food Brokerage Firms

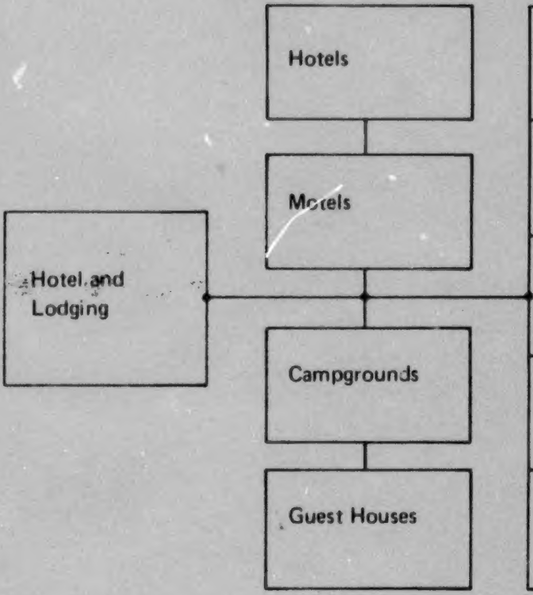
SELLING	Manufacturer's Representative Cashier
BUYING	Food Broker Meat Buyer
SALES PROMOTION	Food Demonstrator Display Supervisor
MARKET RESEARCH	Test Market Supervisor Customer Interviewer
MANAGEMENT	Supermarket Manager District Manager

SERVICES FOR PERSONAL NEEDS

This subcluster includes those occupations concerned with marketing services which meet the personal needs of the consumer. Examples of employers in this subcluster include hotels, travel agencies, beauty shops, florist shops, dry cleaning establishments, and amusement parks. The occupations in this subcluster include dry cleaning clerk, golf club manager, tourism director, hotel manager, and director of sales promotion.

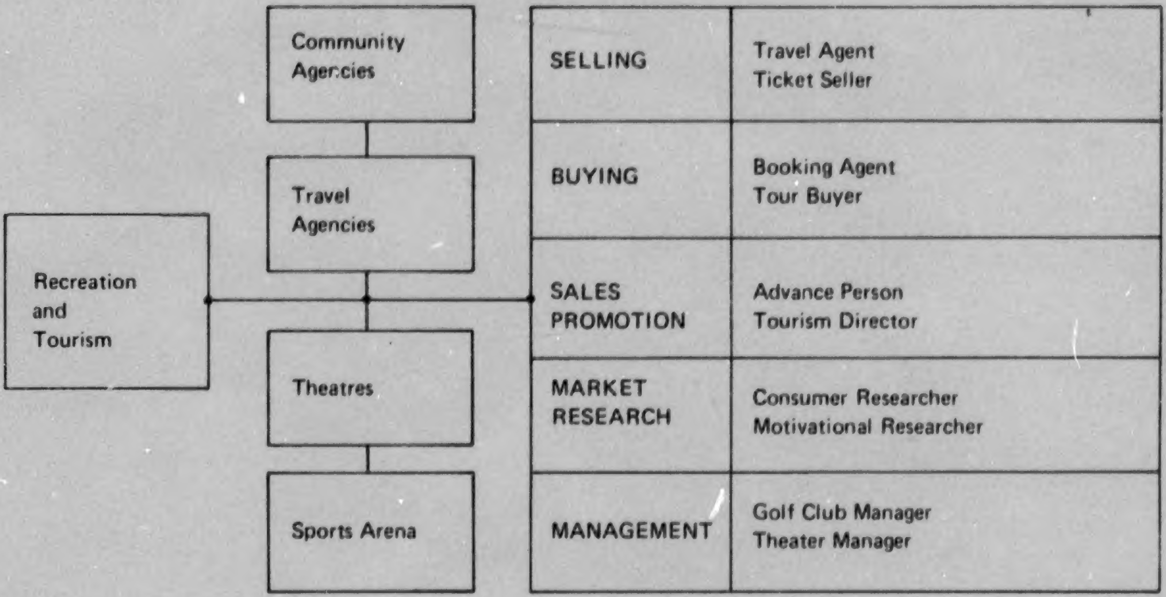

Food Services
Restaurants
Cafeterias
Catering Services
Concessions

SELLING	Function Planner Waiter/Waitress
BUYING	Paper Goods Buyer Purchasing Agent
SALES PROMOTION	Host/Hostess
MARKET RESEARCH	Motivational Researcher
MANAGEMENT	Restaurant Manager

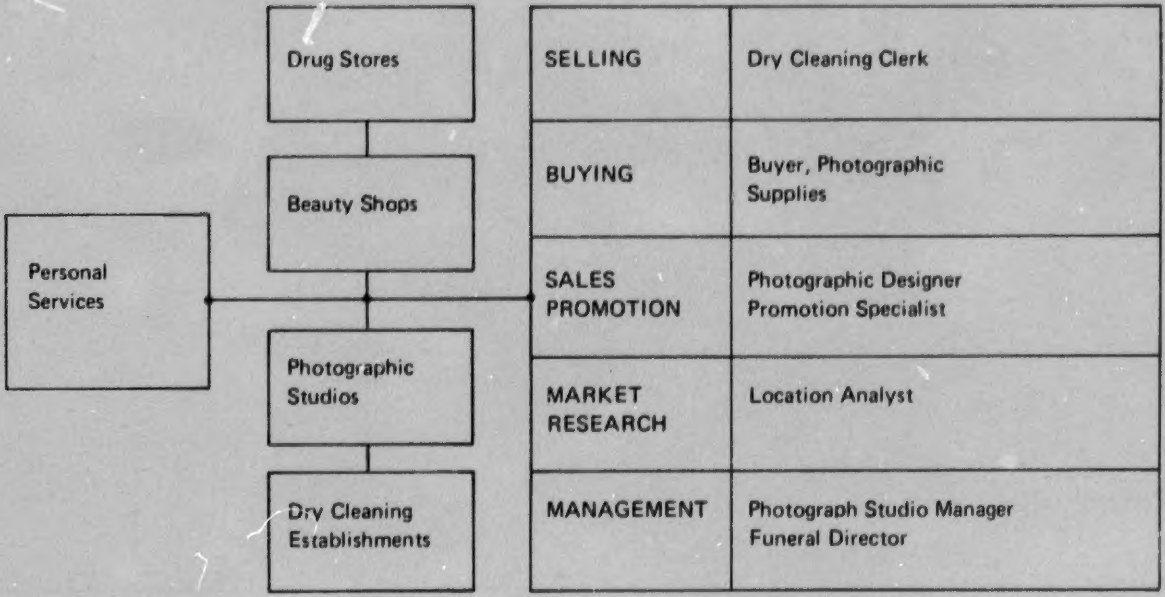

Hotel and Lodging
Hotels
Motels
Campgrounds
Guest Houses

SELLING	Convention Coordinator Front Desk Clerk
BUYING	Purchasing Agent, Supplies
SALES PROMOTION	Hospitality Host Director of Sales Promotion
MARKET RESEARCH	Survey Designer
MANAGEMENT	Hotel Manager Front Office Manager

SERVICES FOR PERSONAL NEEDS

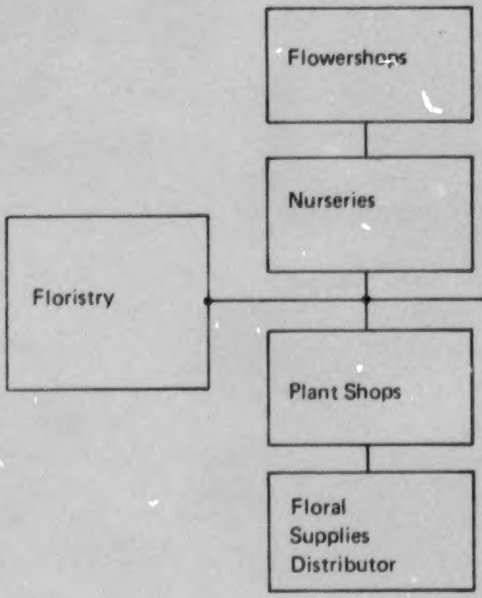

Recreation and Tourism
Community Agencies
Travel Agencies
Theatres
Sports Arena

SELLING	Travel Agent Ticket Seller
BUYING	Booking Agent Tour Buyer
SALES PROMOTION	Advance Person Tourism Director
MARKET RESEARCH	Consumer Researcher Motivational Researcher
MANAGEMENT	Golf Club Manager Theater Manager


Personal Services
Drug Stores
Beauty Shops
Photographic Studios
Dry Cleaning Establishments

SELLING	Dry Cleaning Clerk
BUYING	Buyer, Photographic Supplies
SALES PROMOTION	Photographic Designer Promotion Specialist
MARKET RESEARCH	Location Analyst
MANAGEMENT	Photograph Studio Manager Funeral Director

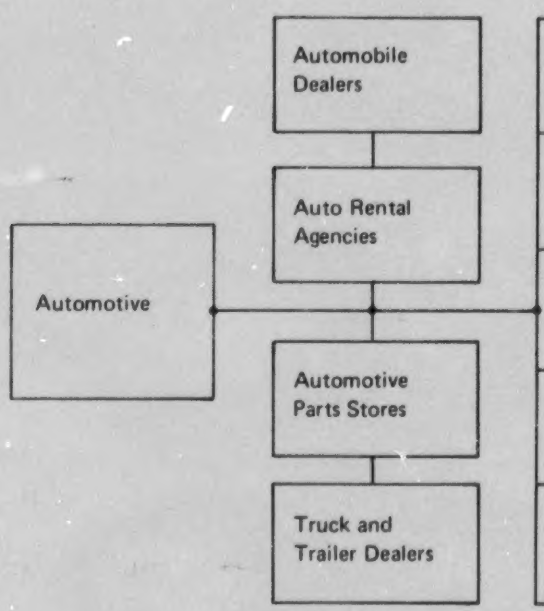
SERVICES FOR PERSONAL NEEDS


Floristry
Flowershops
Nurseries
Plant Shops
Floral Supplies Distributor

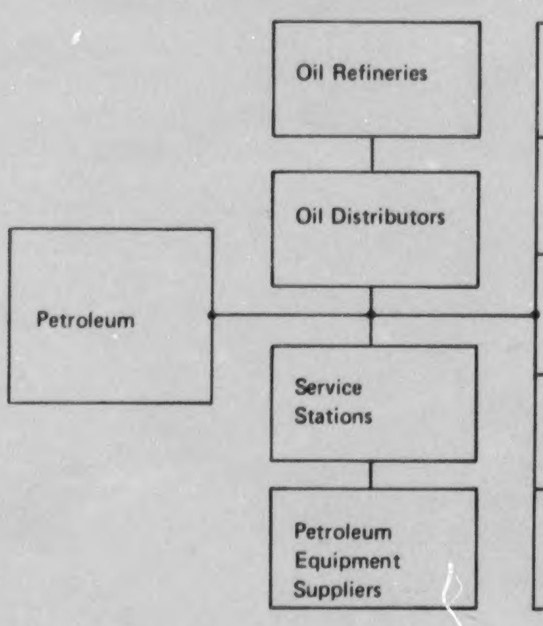
SELLING	Flower Salesperson Florist Supplies Salesperson
BUYING	Flower Buyer
SALES PROMOTION	Floral Design Consultant Flower Display Arranger
MARKET RESEARCH	Market Analyst
MANAGEMENT	Florist Shop Manager Wholesale Florist Manager

TRANSPORTATION SERVICES

This subcluster includes those occupations involved in the marketing of transportation services, equipment and fuel. Examples of employers in this subcluster are automotive part stores, automobile dealers, oil distributors, airlines, railroads and marine supply stores. Among the occupations of this subcluster are flight attendant, aircraft salesperson, consumer researcher, procurer of fuel, parts manager, customer interviewer, trailer salesperson and auto appraiser.

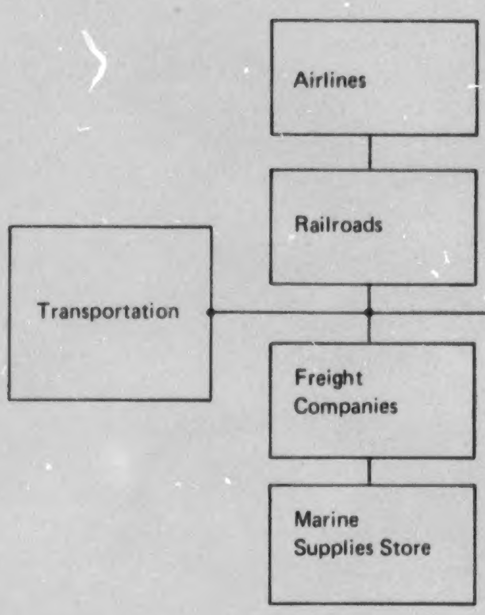

Automobile Dealers
Auto Rental Agencies
Automotive
Automotive Parts Stores
Truck and Trailer Dealers

SELLING	Automobile Salesperson Trailer Salesperson
BUYING	Auto Appraiser Purchasing Agents, Parts
SALES PROMOTION	Product Demonstrator
MARKET RESEARCH	Customer Interviewer Sales Forecaster
MANAGEMENT	Parts Manager Auto Agency Owner


Oil Refineries
Oil Distributors
Petroleum
Service Stations
Petroleum Equipment Suppliers

SELLING	Salesperson, Oil Field Supplies
BUYING	Fuel Procurer
SALES PROMOTION	Promotion Director
MARKET RESEARCH	Consumer Researcher
MANAGEMENT	Contracts Manager Manager, Bulk Plant

TRANSPORTATION SERVICES


Transportation
Airlines
Railroads
Freight Companies
Marine Supplies Store

SELLING	Aircraft Salesperson Reservations Agent
BUYING	Flight Supplies Buyer
SALES PROMOTION	Flight Attendant
MARKET RESEARCH	Schedule Analyst
MANAGEMENT	Airport Manager Flight Supervisor

ACTIVITY B. *A Look at Marketing and Distribution Occupations*

PART I: IS THAT WHERE THEY WORK?

Instructions

Listed below are two columns. The first column below lists industries and employers which are part of Marketing and Distribution. The second column lists some marketing and distribution occupations. Match the marketing and distribution occupation with the *most closely related* marketing and distribution industry or employer. Write the letter of the appropriate occupation next to the name of the industry or employer. You may refer to the cluster diagrams for assistance. Each letter may be used only once.

	Industries and Employers		Occupations
1.	_____ Fashion Industry	A.	Deli Clerk
2.	_____ Automotive Industry	B.	Drapery Salesperson
3.	_____ Industrial Marketing	C.	Comparison Shopper
4.	_____ Discount Stores	D.	Media Buyer
5.	_____ Supermarkets	E.	Claims Clerk
6.	_____ Advertising	F.	Credit Investigator
7.	_____ Insurance	G.	Maitre D'Hotel
8.	_____ Financial Services	H.	Computer Salesperson
9.	_____ Restaurants	I.	Small Leather Goods Buyer
10.	_____ Travel Agencies	J.	Reservation Agent
11.	_____ Home Furnishings	K.	Appraiser
12.	_____ Hotels	L.	Conference Coordinator

PART II: SO THAT'S WHAT THEY DO!!

Instructions

Listed below are ten brief descriptions of occupations in Marketing and Distribution. Match marketing and distribution occupations with the appropriate description. Each description is followed by a blank. Write the number of the appropriate occupation next to the description. You may refer to the cluster diagrams for assistance.

Descriptions

A. I supervise fashion shows and special promotions for speciality stores. __________

B. I am in charge of supervising all of the employees in a supermarket. __________

C. I assist people in making arrangements for vacations. __________

D. I sell office machines to businesses. __________

E. I register guests in motels. __________

F. I work with businesses promoting the services of advertising agencies. __________

G. I work on the floor of the stock exchange, buying securities for clients. __________

H. I "check" people out of supermarkets.

____

I. I try to find out why people are buying certain products. __________

J. I show people to their seats, serve them their meals and demonstrate safety procedures. __________

Occupations

1. Motivation Researcher
2. Office Machines Salesperson
3. Travel Agent
4. Front Office Clerk
5. Account Executive
6. Supermarket Manager
7. Flight Attendant
8. Stock Trader
9. Fashion Coordinator
10. Cashier

PART III. WHO SAID THAT?

Instructions

Listed below in the first column are a series of typical comments which might be made by people employed in Marketing and Distribution. In the second column are a list of the marketing and distribution employees who may have made these comments. Match the numbers with the appropriate comment. Write the number of the appropriate occupation next to the comment. Each number may be used only once. You may refer to the cluster diagrams for assistance.

Comments

A. "I'd like to buy four dozen of the pre-washed blue denim dungarees, size 26." ________

B. "Your cost on this beauty will be $3150 plus the trade-in." ________

C. "Is there any chance that we could get 'Great Dextrous' for the fifteenth of November at Hamden Hall?" ________

D. "Doctor, I think you should set up a three-chair office." ________

E. "We'll need more runway space if we want to accommodate Community Airlines." ________

F. "Would you like me to fill it?" ________

G. "I think that we should go for one minute on the World Series rather than the Superbowl." ________

H. "All you do is put the fruit into this nozzle, and one minute later, you remove the nozzle and . . . presto – the fruit has been cut into a flower." ________

I. "We should pack the paint away before we start anything else. ________

J. "Let's get them from our supplier in Afghanistan."

Occupations

1. Service Station Attendant
2. Media Researcher
3. Product Demonstrator
4. Apparel Buyer
5. Auto Salesperson
6. Booking Agent
7. Dental Equipment Salesperson
8. Airport Manager
9. Import Buyer
10. Hardware Store Manager

ACTIVITY C. *Who is the Consumer?*

Instructions

The purpose of this exercise is to get you to match consumers with the businesses they patronize. Note that a business may be patronized by more than one consumer; therefore multiple matches are possible.

Businesses

1. Real Estate Agency ____________________
2. Furniture Store ____________________
3. Hardware Store ____________________
4. Supermarket ____________________
5. Wholesaler for Auto Parts ____________
6. Gas Station ____________________
7. Amusement Park ________________
8. Hotel ________________________
9. Wholesaler for Cosmetics ____________
10. Drug Store ____________________
11. Book Store ____________________
12. Sporting Goods Store ______________
13. Nursery (for plants and flowers) ____________________
14. Stationery Store ________________
15. Insurance Company ______________
16. Wholesale Food Company ___________

Consumers

A. Car Dealership
B. High School Students
C. Florist Shop
D. Veterans of Foreign Wars (VFW)
E. Little League
F. Girl Scouts
G. Parents
H Catering Company
I. Trucking Company
J. University
K. Restaurant
L. Beauty Shop
M. Supermarket
N. League of Women Voters

ACTIVITY D. *If You're in a Hurry*

Instructions

Read the descriptions of consumer needs and preferences below. Then locate the business (you don't have to use each business listed) which would best serve each consumer's needs. Write the letter of the business you pick next to the consumer number.

Consumers

1. You left your wallet home today and find you only have 90 cents in your pocket. It's nearly lunch time. Where can you eat for 90 cents?
2. Now that you've saved the money for it, you're ready for a special hairstyling. You've been looking forward to this and have set aside next Friday as the day for YOU.
3. The price of clothing these days is so high that you've decided you must economize, especially on such items as socks which always seem to get lost anyway. You are about to shop at __________?
4. It's Irene's birthday and you want to take her out to dinner. You know she'd love to have a chance to wear her new satin dress. (Wait till she sees what you bought her to go with it!) Where shall you reserve a table for two?
5. Dinner guests are arriving in a half hour and you just ran out of butter. You'll pay whatever you have to if you can get it *fast*! Where should you go?
6. With the new season, you're ready to shop for your wardrobe. If there's one thing you want to avoid, it's crowds. You have time, money, and like to be waited on when you do your semi-annual major clothes purchasing. Where do you shop?
7. You need a haircut. Now that you have a free hour, you wish you could get one right now. Is there any place to get one now?
8. With a broken leg, shopping for the family's food is certainly going to be a problem. Can you find a supermarket that will help you out?

Businesses

A. **Sutton's** is a department store that can make you want to buy anything. It's known for its excellent staff of sales people who know the fine points of their products and look it. They dress rather well. Visitors in town often stop in just to see the store – everything is displayed so beautifully. But not everyone can buy here. The prices are very high.

B. **Quick-E** is the city's biggest food market chain. You can get just about anything you want there, including some things you've never heard of. A recent study by the local newspaper showed that Quick-E has, on the average, the lowest food prices of any supermarket chain in the city. They cash checks and will load your car as you drive up. They're promoting their own bakery products now by providing generous samples to customers as they walk in.

C. **T'Hairs** is a his and her hair styling shop which is attracting many customers. Lesley, the owner, did a study of beauty and barber shops and figured out that with enough help, many customers could be serviced at the same time. It's a no-frills, no-appointments place which serves about 300 people during a 5-day week.

D. **Jo's Burger Beat** has some of the best hamburgers in town. It's part of a national chain just opening up here. Quick, clean and cheap. Special this week: Roast beef sandwich, 75 cents.

E. **Jonathan and Jacqueline** (also known as J & J) was started by a bright young couple to beat the high cost of everything. It carries just about everything you could want, from flowers to clothing, to hardware, to automobile parts, to toys, to linens, to cosmetics. It's all self-service but if you're willing to hunt and peck and find what you want on your own, you'll save a good bit of money. Not recommended for the impatient.

F. **The Manse** is the oldest restaurant in town. It's small and quiet. Dinner by candlelight. Expect to spend at least $15 per person. Reservations only. Call well in advance and don't be late.

G. **Four Seasons** employs two of the most famous hair stylists in the region and people travel hundreds of miles for them. A hairstyling costs nearly twice the average price. You can even pay to have an oil bath. A waiter serves coffee and hors d'oeuvres to customers all the time they are in the shop. The red velvet cushions on the seats and the crystal chandelier are brand new. It often takes up to four weeks to get an appointment.

H. **Chuck's Place** carries many more brands of food items than most small, neighborhood groceries of its kind. But, its prices are probably the highest in town. They're at least 20 per cent higher than the nearest supermarket and probably 10 per cent higher than a grocery a few miles away. Still, customers seem willing to pay the price. It's right in the center of a residential neighborhood and no other stores are nearby. Besides, Chuck delivers if you call your order in early in the morning and will let you charge your purchases. He knows just about everybody in the neighborhood and they all pay their bills.

ACTIVITY E. *We've Got One Right Here in Town.*

Instructions

1. In this activity, you will prepare a shopper's guide for new residents in your city or town.
2. You will begin by listing all the goods and services a new resident would need, beginning with a place to live, a bank, insurance, food market, etc.
3. Try to be complete in your listing.
4. You will compare the class list with the cluster diagram and group the items on your list by subcluster.
5. Then, you will try to find at least two different businesses in your community which satisfy the needs on your list at different prices and in different ways. For example, for "eating out," you'll need to find a restaurant which serves inexpensive food quickly and/or one which caters to relaxed, late-night "tie and jacket" dining and/or one which caters to families with children who want plain but good food.
6. You'll use many different sources to find the businesses. You may visit some with your class or on your own; ask your parents, use the Yellow Pages; check newspaper ads.
7. Be sure to write down the information called for on the attached sheet for each business which provides the goods and services assigned to you to look into.

SHOPPER'S GUIDE: TAKING NOTES

Consumer Need ______________________________

Business Name: ______________________________

Address: ______________________________

When Is It Open? ____________ Days ____________ Hours ____________

What Does It Offer? ______________________________

Type of Product or Service ______________________________
(e.g. with-it clothing for
men and women)

What Kind of Place Is It? ______________________________
(e.g., crowded, noisy, few
salespeople)

What's Special About It? ______________________________
(e.g., lots of parking,
home deliveries)

What Will It Cost? ______________________________

Price Range ______________________________
(least and most expensive
items)

Example: ______________________________
(e.g., sneakers @ $4.95)

Who Do You Think Should
Shop Here? ______________________________
(e.g., people in a hurry,
people with a lot of money)

UNIT 8: ENTREPRENEURSHIP: DOING YOUR OWN THING

Student Materials

OVERVIEW

ACTIVITIES	MATERIALS
A. *What Entrepreneurship Is All About* Examine the pervasiveness of entrepreneurship in the American economy and why entrepreneurs succeed or fail.	Information Sheet
B. *What Kind of People Are Entrepreneurs?* Examine personal traits of entrepreneurs and experiment with occupational characteristics of independent business ownership.	Information Sheet
C. *I'd Rather Do It Myself* Interview entrepreneurs to examine further the advantages and disadvantages of selecting this career option.	Entrepreneur Interview Form

ACTIVITY A: *What Entrepreneurship is All About*

ENTREPRENEURSHIP AS AN OCCUPATION

An entrepreneur is someone who owns and operates his/her own business. Examples of entrepreneurship are many in the field of marketing and distribution. For example, many grocery stores are owned by one person, or a family. Another example is boutiques (specialty clothing stores) which are usually small and owned and operated by one person.

For almost every marketing and distribution occupation, there is a related opportunity for entrepreneurship. Below are examples of only a few:

Marketing and Distribution Occupations	Opportunity for Entrepreneurship
Salesperson in a clothing store	Owner of clothing store
Account executive for advertising firm	Owner of advertising agency
Manager at supermarket	Owner of grocery store
Real estate agent	Owner of real estate agency
Flower arranger at florist shop	Owner of florist shop
Service station attendant	Owner of automobile repair shop

THE PERVASIVENESS OF SMALL BUSINESS

Every year over 250,000 new businesses are formed in the United States. By far the greatest number of these new ventures are small businesses and will probably remain so over their lifetimes.

While small businesses* account for only a minority of the sales, assets (equipment, cash, etc.), and profits of American business, they represent the overwhelming majority of business enterprises.** 88% of all proprietorships, 66% of all partnerships, and 38% of all corporations are small firms with gross receipts (total sales without considering expenses and taxes) under $50,000. Thus, not only is the typical enterprise a small one, but it is also typically self-owned. In fact, of the twelve million establishments filing with the Internal Revenue Service in 1969, over eight million (69%) were *both* proprietorships and small (i.e. sales less than $50,000). Entrepreneurship is thus an important element in the careers of many Americans. At least eight million people, 10% of the work force, are owners of small businesses, and a good many more work in such small businesses.

What are some of the characteristics of this typical enterprise, the small proprietorship? For one thing, small proprietorships clearly dominate several sectors of the economy. They represent most of the firms in agriculture, forestry and fishing, most service firms and just over half of the firms in wholesale and retail trade. Fewer small firms are formed in manufacturing, construction, mining and finance. It is not hard to understand why the small proprietorships are concentrated in these few selected areas. Excluding agriculture, these industries typically require relatively little money to start. Money is needed for buying goods and for salaries, but the amounts are less than required to buy equipment and build factories for manufacturing. In addition, technical skills needed in service or trade are more easily acquired than the engineering skills of a manufacturer or the financial skills needed in banking.

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*Definitions of "small business" vary considerably. For example, in terms of gross receipts, the definitions vary from $50,000 to $1 million.

**The following data, except where otherwise noted, is derived from U.S. Bureau of the Census, Statistical Abstract of the United States: 1972.

THE MORTALITY OF SMALL BUSINESS

In spite of its appeal entrepreneurship is a difficult career path. It appears that many small business owners do not possess the required money and skills. The typical firm does not survive more than two years. In 1971, for example, most of the businesses that closed down were small. A detailed study of small businesses, conducted for the Small Business Administration in 1961, showed that half of the businesses studied ceased operations within the first two years.*

Among the primary reasons for failure were the following:

- Poor locations were chosen. Location is particularly important for service (e.g., hotels) or trade business.
- Disregard of competition. For example, some of the grocery stores in the study opened in areas which already had many successful grocery stores.
- Too little money. The businesses did not have enough money to keep going until they established themselves with customers.
- Lack of general management know-how. Businesspersons did not know enough about how to run the business, such as financial planning and control, knowledge of the business itself, knowledge of personnel needs, and ability to analyze the nature of the business and its potential markets.

Businesses which survived and succeeded also showed certain characteristics. The study also revealed some of the factors which contributed to the success of the survivors. These included:

- Persistence and preparation. The successful businessmen realized that they would not achieve their goals and profits immediately and were prepared, both psychologically and financially, to endure a year or more of losses.
- Ownership experience. Through previous experience in owning their own businesses, many successful owners had learned about the problems of starting a new venture, and had acquired the skills needed to operate one.
- Adequate money. Adequate money is required to begin the business on a firm footing and to survive the start-up period before sales pick up. This money often comes from personal savings.
- General managerial know-how. This involves having knowledge and ability in sales, advertising, control and planning in order to avoid the problems which plagued the failures.

Many of the skills such as advertising, financing, etc., considered necessary for successful entrepreneurship are skills required for marketing and distribution in general. Since many of the products and services of marketing and distribution are also suitable for small businesses, entrepreneurship is a real career option for this field.

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*Kurt B. Mayer and Sidney Goldstein. *The First Two Years: Small Firm Growth and Survival Problems.* Washington, D.C.: Small Business Administration, 1961.

ACTIVITY B. *What Kind of People are Entrepreneurs?*

ENTREPRENEURS AS PEOPLE

In many respects, the small business owner represents what people around the world think of as the typical American. Basic American values – individualism, initiative, independence, persistence, inventiveness, hard work, free enterprise – are expressed in the careers of small business owners. Opportunity, the lure for hundreds of thousands of immigrants throughout the history of the United States, was often realized in the form of self-employment. Many a great fortune was built on a small beginning.

The chance for any individual to succeed on his own efforts still attracts many people. Even though there are many large multi-national corporations in our economy, great success has been achieved by small business owners in recent years.

Why is entrepreneurship so attractive? Entrepreneurship is seen as a chance to gain special rewards. These rewards include independence, high income, personal growth, being in charge, trying one's own ideas, choosing one's own work hours, and so forth.

Special responsibilities also fall to the entrepreneur as the ultimate decision-maker in his/her business, who enjoys or suffers the results of his/her own decisions. For example, in a cash squeeze, the business owner will pay his/her employees first and delay paying him/herself.

Many people begin their own businesses but fewer numbers of them succeed. What distinguishes the successful entrepreneur from the unsuccessful one? Successful entrepreneurs are characterized by the following traits:

- ambition, energy and drive
- ability to communicate
- technical knowledge on how to operate a business
- persistence
- ability to absorb setbacks
- realistic expectations about the hard work required
- patience to wait until the business really "takes off"
- ability to take full responsibility for decisions
- resources to outlast lack of income
- independence

As one small business owner said, loneliness is part of owning one's own firm. There is no one to congratulate you for good decisions, to prevent you from making poor ones or to assume responsibility for you. But then, there is nobody to tell you what to do if you want to "do your own thing."

ACTIVITY C. *I'd Rather do it Myself*

Instructions

Use this guide as you interview local entrepreneurs about their experiences.

Business:____________________ Size: (number of employees)________

1. How long have you been in business for yourself?____________________
2. When did you decide to go into your own business?____________________
3. Why?____________________
4. Did you hold any jobs previously which you feel prepared you well for starting your own business? If yes, what were they?

   ____
5. What kind of formal education and training did you have prior to starting/acquiring your own business?

   ____
6. Did you have difficulty in obtaining money to start your own business? __________
7. What advice would you give young people who want to go into business for themselves about how to acquire enough money to be able to do so? ____________________
8. What do you enjoy most about being in business for yourself?____________________
9. What do you enjoy least about being in business for yourself?____________________
10. Would you work shorter hours if you did not have your own business?____________________
11. How do you spend your time when you are not working?____________________

UNIT 9: ALTERNATE ROUTES TO CAREER GOALS

Student Materials

OVERVIEW

ACTIVITIES	MATERIALS
A. *Let's See How Charlie Moves* Examine an individual's work history to illustrate the importance of making the most of previous work experiences in seizing future opportunities.	Career Paths, Chart, Case on Charles Pinkley
B. *Moving On Up* Examine how skills are related among jobs.	List of Job Choices
C. *Stepping Along* Develop a career path to illustrate that career paths represent a dynamic history as well as an enabler for the future.	Listing of Job Descriptions
D. *Schooling for Moving* Examine the many educational options available to persons interested in pursuing careers in marketing and distribution.	Information Sheet, Decision Tree on Educational Options

ACTIVITY A. *Let's See How Charlie Moves*

Instructions

1. Study the Career Paths Charts to see how people in the same occupation got there through different routes.
2. Then, read the description of Charles Pinkley's career history and follow his career path. Answer the questions about points of movement along the way.

CAREER PATHS CHART

					GOAL
John:	B.A. Degree Hotel Administration →		Assistant Manager →		**HOTEL MANAGER**
Robert:	Desk Clerk Front Desk →		Manager Front Desk →	Manager Hotel Services →	
Delores:	Manager of Restaurant →				
Jim:	Opened Own Hotel →				
Joan:	Adult Ed Course →		License →		**REAL ESTATE AGENT**
Larry:	Sales Representative of other products →		License →		
Barbara:	Clerk →	Scheduling Showings →	Apprenticeship →	License →	
Keith:	Radio and Television Mechanic →		Sales Trainee →		**RADIO AND TELEVISION SALESPERSON**
Mary:	D.E. Training in Technical School →				
Walter:	Salesperson for other products →				

CHARLES PINKLEY

Charles Pinkley started his work career as a cashier in a furniture store. After two years, he was promoted to being a salesman in the furniture store. He did this for three years before he decided to try a different kind of business. He became a salesman in a book store. He did well at the job and was soon promoted to assistant manager of the book store. Although he did well at the job, he again decided to try another business. He got a job as assistant manager in a supermarket. He did well because he was a hard worker and eventually became the general manager of the supermarket. After such varied experience, he decided to return to his original employer at the furniture store. Because of his experience, he was hired as the general manager of the furniture store.

1. Can you identify the lateral movements in Charles' work history? List them below.

2. Can you identify the upward movements in his work history? List them below.

3. List the industries that Charles worked in.

ACTIVITY B. *Moving On Up*

Instructions

For each of the 5 occupations, pick the one which provides the best experience for it. Be prepared to justify your answers.

MOVING ON UP

1. **Manager, Automobile Dealership**
    a. Manager, Service and Supplies, Auto Parts
    b. Car-Wash Supervisor
    c. Salesperson, Motor Vehicles and Supplies

2. **Advertising Layout Person**
    a. Display Person
    b. Salesperson, Signs and Displays
    c. Proofreader

3. **Furniture Dealer**
    a. Interior Decorator
    b. Inspector
    c. Salesperson, Household Equipment

4. **Manager, Hotel**
    a. Convention Coordinator
    b. Bell Captain
    c. Reservations Clerk

5. **Real Estate Agent**
    a. Superintendent, Building
    b. Appraiser
    c. Salesperson, Home Furnishings

ACTIVITY C. *Stepping Along*

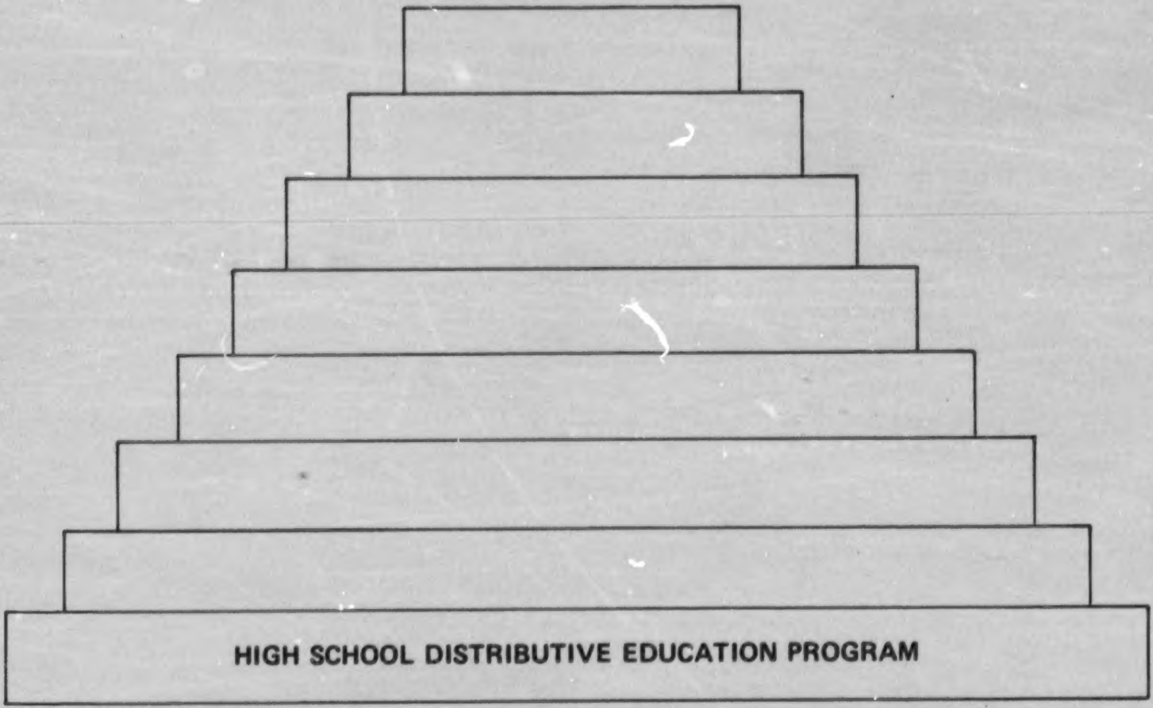
Instructions

Based upon the job descriptions given below, develop a career path for Ruth Hemingway. You must first select the career objective for Ruth. Then, based upon her objective, fill in her career path with the jobs above. You do not have to use every job given. Use the chart at the bottom of the page to order the jobs in Ruth's career path.

JOB DESCRIPTIONS

Copywriter:	Consults with colleagues to obtain information about production or services.
Account Executive:	Consults with colleagues to determine advertising media to be used and plans advertising program in accordance with client's objectives.
Sign Writer:	Designs and prepares signs
Booking Agent:	Negotiates contracts with performers' representatives
Advertising Layout:	Prepares and reviews art work and designs layout
Manager, Advertising Agency:	Supervises agency personnel, and develops ideas for advertising accounts
Market Research Analyst:	Collects and analyzes data on market conditions.

Career Objective:



ACTIVITY D. *Schooling For Moving*

Instructions

These materials give some picture of the various ways in which education is related to work. Examine the chart which demonstrates a variety of educational paths for people interested in careers in Marketing and Distribution. Notice particularly the different points at which you can make decisions and also that training often continues in adulthood, even while you are employed.

The Information Sheet gives some details about the kinds of training you can receive at different types of institutions and at different points in your career.

HIGH SCHOOL PROGRAMS

One educational route a person interested in pursuing training for a career in Marketing and Distribution can take is to enroll in the distributive education program in a comprehensive high school. This program focuses on developing skills which are needed primarily for entry-level employment in this field.

The method used by most distributive education programs is one of its attractions. Usually it has a cooperative work experience component in which the student spends half of the day in a business performing the tasks and responsibilities of a marketing and distribution employee. In most cases, the student is paid for his/her services and receives on-the-job training.

At the conclusion of participation in a distributive education program, which in some schools is two years, and in others only one, a student should be able to obtain employment in marketing and distribution occupations such as salesperson or display person.

POSTSECONDARY PROGRAMS

Another option available to persons desiring training for a career in marketing and distribution is postsecondary education. These institutions, for the most part, allow students to concentrate in specialized areas of a field. Postsecondary institutions prepare people for higher-level jobs. A student may pursue special aspects of the field, such as real estate. At the conclusion of participation in a postsecondary program, a student should be able to obtain a skilled job such as assistant buyer or become a management trainee. Postsecondary programs usually take two years.

COLLEGE PROGRAMS

College certainly represents a viable option for persons interested in the field of Marketing and Distribution. Several fields of concentration in a liberal arts program, such as economics, sociology and psychology, are relevant to the skills required for many jobs in this field. A degree in Business Administration concentrating in fields such as marketing, accounting or real estate is particularly suitable for obtaining employment in marketing and distribution. Upon completion of a college program, a student should be able to obtain many diverse and skilled jobs in this field such as market research analyst, or sales representative for a variety of products or services.

It should be noted that for students specifically interested in management level careers in this field, a Masters in Business Administration is available. This degree program takes 1 to 2 years beyond college. It permits students to concentrate in specialized areas of the field, such as finance, and qualifies them for management positions.

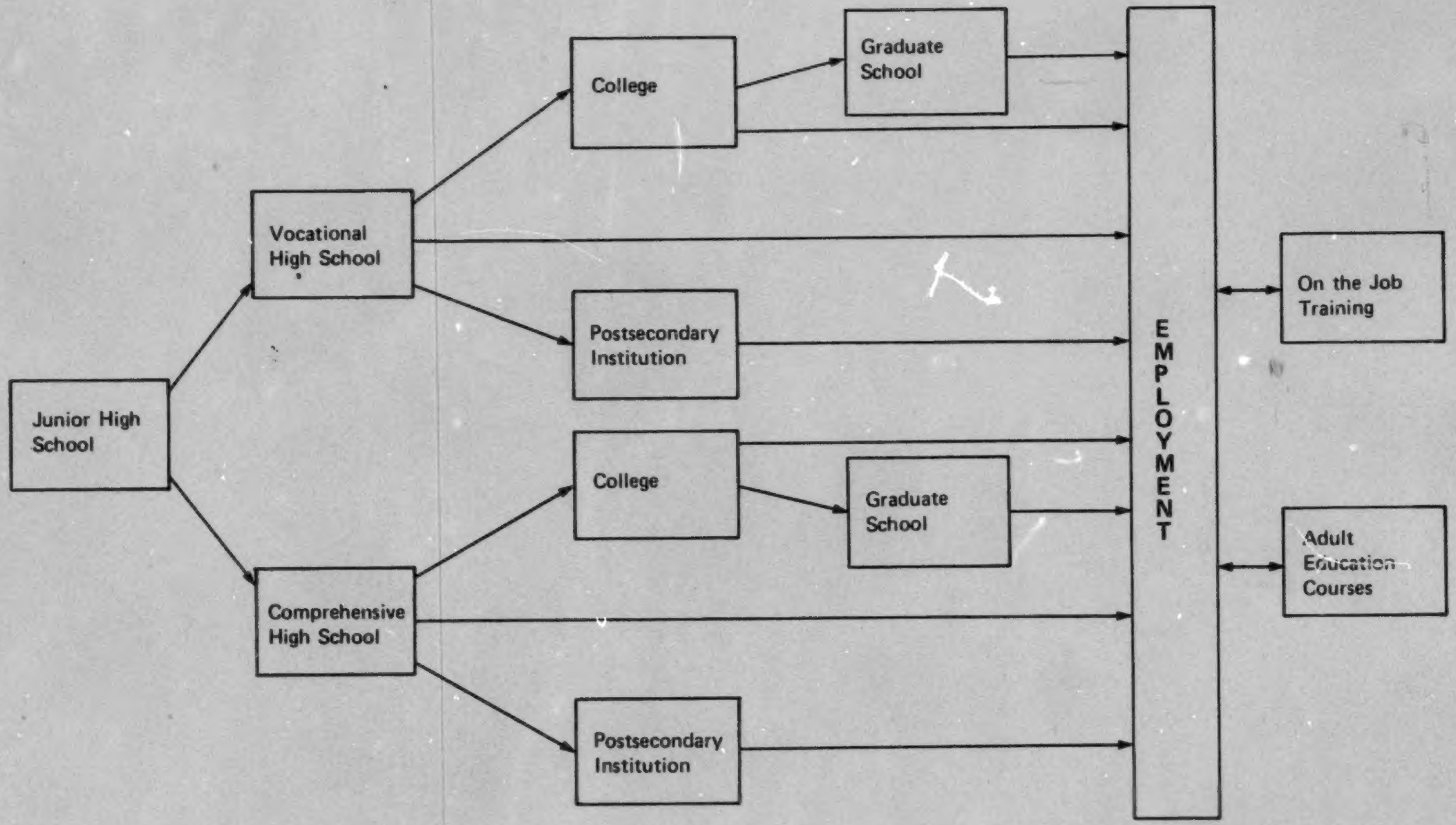
ADULT EDUCATION PROGRAMS

Most communities also provide training for careers in the field of marketing and distribution through adult education programs. These programs have courses which range from training for entry-level positions (such as sales clerk) to training for mid-management positions (such as supervisor of a department in a clothing store). The nature and extent of these programs vary. The content of the courses ranges from skills involved in retailing to interpersonal skills.

Persons participate in adult education programs for a variety of reasons. Sometimes an individual desires entry into the field of marketing and distribution. Other times, an individual is trying to upgrade skills he/she already has to do a better job, or acquire new skills to qualify for advancement.

What a person achieves at the conclusion of an adult education program depends upon what the individual seeks to accomplish.

CAREER PATHS CHART


Junior High School
Vocational High School
Comprehensive High School
College
Postsecondary Institution
College
Postsecondary Institution
Graduate School
Graduate School
EMPLOYMENT
On the Job Training
Adult Education Courses

UNIT 10: BASIC PRINCIPLES OF MARKETING AND DISTRIBUTION

Student Materials

OVERVIEW

ACTIVITIES	MATERIALS
A. *Marketing* Illustrate how marketing processes work via a pantomime with objects.	Information Sheet; objects in the classroom
B. *Exchange* Explain the fundamental concept of exchange by explaining it to an imaginary group of Kindergarten students.	Information Sheet
C. *Supply and Demand* Identify how the concept of supply and demand is fundamental to our economy through experimenting with an example in a mini-game.	Information Sheet
D. *Market* Illustrate the importance of market segmentation and identification of marketplace by defining each for a product and service.	Information Sheet; listing of suggested products and services.
E. *Channels of Distribution* With pictures from magazines, illustrate how products move through channels of distribution.	Information Sheet; magazines.
F. *Value-Added* Illustrate the concept of value-added by adding value to an object in your desks.	Information Sheet
G. *Profit* Prepare a script to explain the concept of profit and the benefits derived from it to a group of foreign students.	Information Sheet

H. *Competition*

Develop a collage from newspaper clippings to illustrate the pervasiveness of competition among businesses in our economy.	Information Sheet; Newspaper

I. *Risk*

With examples, explain the concept of risk to other members of the class.	Information Sheet

J. *Forms of Ownership*

Analyze how forms of ownership depend upon nature of businesses by identifying different forms used by businesses in your community.	Information Sheet

Instructions

The information sheets in this unit should acquaint you with principles basic to marketing and distribution. After you read them, your teacher will ask you to *demonstrate* your understanding of the information.

To show you understand	You will
Marketing	Develop a pantomime
Exchange	Explain it to 5 year olds
Supply and Demand	Participate in a buying-selling mini-game
Market	Define a local market and marketplace for a product or service
Channels of Distribution	Chart the channels for a product
Value-Added	Add value to an object
Profit	Prepare a script to explain it to foreign students
Competition	Make a collage of current examples of competition
Risk	Present examples of risk to the class.
Forms of Ownership	Identify the different forms of ownership in your community.

ACTIVITY A. *Marketing*

Marketing is an integral part of our economic system. It is the important link between the other two components of the system: production and consumption. Marketing is complex. It involves all the planning, promotion and distribution activities that are involved in getting products from the producer to the consumer. In fact, every business that is involved in selling a product or service to a consumer is involved in marketing. In the United States, planning for marketing is not centralized. It is done by a variety of individuals who work on planning for a particular product, set of products or services.

Marketing involves many tasks and functions. These are handled by a wide variety of different types of businesses. Advertising agencies, wholesalers and retailers are some examples. Advertising agencies are responsible for the promotion of a particular product or service. Wholesaling is the business of storing and distributing goods to retailers – the stores where we usually find them. Each of these, advertising, wholesaling and retailing, are major industries in our economy.

The key to decision-making in marketing is determining what the consumer needs and wants. If a business serves consumer needs, it is likely to succeed. Sometimes the consumer is an individual and sometimes the consumer is a business. In either case, consumer needs and wants determine what the marketing system will look like. In our economy, consumer preferences replace centralized planning of marketing functions. This encourages a great variety of goods and services to be made available by imaginative businesspersons to satisfy consumers.

ACTIVITY B. *Exchange*

All people, no matter where they live, have certain basic needs, such as food, shelter and clothing. Every country or society organizes or develops a system to get those needs fulfilled. The principle underlying these systems is that of exchange. In primitive, small societies, the medium of exchange is goods. That is, individuals find someone who wants the goods that they have and who has goods that they want and they trade – an exchange takes place. Although this system works for primitive societies, it is much too cumbersome for large, highly industrialized, modern societies. In modern societies money, not goods, is the medium of exchange. Money is the standard against which the value of products and services is measured. Workers sell their services for money and business owners receive money for the sale of their products or services.

ACTIVITY C. *Supply and Demand*

The basic questions which have to be answered by any economic system are: what is to be produced, how much is to be produced and for whom is it to be produced? No individual or group of individuals sits in a central place and makes these decisions. Rather, these decisions are made indirectly by producers and consumers according to a principle which has come to be known as the law of supply and demand.

The prices of goods and services are affected by this principle. If consumer demand for a product or service is greater than the supply, the price of the product goes up. Thus, as businesspersons see that producing this product or service is profitable, they begin to increase the supply of the product or service and the price of the product or service begins to fall. On the other hand, if there is a product on the market for which there is little demand, the price of the product will fall. If demand for the product continues to be minimal, the product will eventually disappear from the marketplace.

For example, if because of poor weather conditions, the supply of pears is limited, the price of pears will rise. People who want pears badly enough will pay more to get them. Those who would be just as happy with peaches will forego paying more for pears. Thus, only the people who can and want to pay the price will buy pears.

If the next year perfect weather results in a huge crop of pears (a large supply), the increased supply will cause the price of pears to fall. People who love pears are in luck. Others may buy pears anyway because they represent a bargain. The large supply will thus get consumed. The seller is happy to sell more pears at low prices rather than have pears taking up space in the market or rotting. Selling 100 pears at a nickel each ($5.) is better than selling only 50 out of 100 in the bin at seven cents each ($3.50). (At ten cents each, perhaps only 30 people would want pears badly enough to pay the price. In that case the supply of 100 would exceed the demand of only 30 and drive the price down.)

The law of supply and demand assumes that if the price is right there will always be just the right number of buyers (demand) to consume the existing supply.

In fact, many other factors influence the supply, demand and price of products and services but the basic principle explains the behavior of buyers and sellers in many familiar situations.

ACTIVITY D. *Market*

The term 'market' has two definitions. First, a market is any place where an exchange takes place, that is, where goods and services are bought and sold. Thus, any store qualifies as a market. Second, a market can be any defined portion of the consuming population.

Identification of a market is critical to the businessperson. Few businesspersons market products (such as soap or toothpaste) which all consumers prefer. The businessperson must, therefore, decide which segment of the entire market is interested in his product and direct his planning, promotion and distribution accordingly.

The process of dividing the market into identifiable parts is called market segmentation. Market segments can be characterized by differences in age, sex, income level, education, geography and so forth. Teenagers have different buying habits from adults. Men have different buying habits from women. Product needs in different parts of the country vary. The businessperson must be aware of consumer preferences and habits to market his/her product effectively and profitably. Accordingly, businesses expend considerable resources learning what consumer preferences are. This is called market research.

Research into the characteristics and interests of a particular marketing segment is an ongoing activity. Interests of consumers change, the buying power (money available) of particular marketing segments changes, and, finally the marketing segments themselves change.

Instructions: Select from the list below a product or service. Then, define the market segmentation for the product or service, and the marketplace in your community for the exchange of this product or service.

Product

Dresses
Shoes
Automobiles
Real Estate
Furniture
Gasoline
Desks
Lamps
Flowers

Service

Restaurant
Hotel
Beauty Parlor
Barber Shop
Dry Cleaners

ACTIVITY E. *Channels of Distribution*

Before a product reaches a store shelf, ready to be bought by a consumer, it has passed through many hands. The chain of owners that a product has before it reaches the ultimate consumer is referred to as the "channel of distribution." "Owners" is a key term here because not all those who handle the product are in the channel of distribution – only those who actually assume ownership of the product, and all the risks that that involves, are in the channel of distribution.

Channels of distribution are either direct or indirect. In the direct channel, the product passes directly from the producer to the consumer. Some roadside stands, mail order catalogues, some (not all) door-to-door sales efforts, are examples of direct channels of distribution. Indirect channels of distribution mean that there are middlemen between the producer and the consumer. These include the wholesaler and the retailer.

The channels of distribution which have developed in our modern society are varied and complex. Different types of retail establishments, ranging from large department stores to small neighborhood grocery stores, are familiar to everyone. There is also a variety of types of wholesalers who stock these stores – wholesalers who specialize in certain products, wholesalers who do or do not supply special services (such as assistance in advertising) to the retailer and large and small wholesalers.

ACTIVITY F. *Value-Added*

Typically, a consumer pays more to purchase a product than it costs to produce. Every step in the movement of the product from producer to consumer adds value to it. This increased value comes from making the product usable and available to the consumer. It gets translated into increased costs to the consumer. The trucker or railroad men who transport the product must be paid, the warehousemen who store the goods must be paid, and so on down the chain. Each step in making the product more usable adds value to the product.

Consider a finished product stored in a factory 1,000 miles from your home. Would it do you any good if no transporters moved it to your town? If no stores placed it on their shelves? You would have one of two choices. You could do without the product. Or you could go to get it yourself. In the first instance, you would not obtain value at all from the product because you could not use it. In the second, you would be adding value to it yourself. Instead of paying the cost of somebody else transporting, stocking, selling the product, you would be spending money on gasoline and other costs of operating your vehicle as well as your time. To calculate the cost of the product, you would have to add the value of your time and the costs of going to pick it up.

ACTIVITY G. *Profit*

Pursuit of profit is one of the primary motivating forces behind business operations. Profit is the difference between the cost of producing a product or providing a service and the income gained from those activities. The owners of the business decide how to use the profit. They can keep it or invest it in increased growth of the firm. Some of the costs which a businessperson incurs include labor (employees), equipment, insurance and utilities. In the interests of keeping profits up, it is in the business owner's interest to keep costs down. Thus a businessperson seeks to minimize costs and maximize income.

Most businesses are prepared to operate for at least a short period of time without realizing a profit. This is especially true of new businesses and entrepreneurships which can expect to operate for one, two or more years without realizing a profit. Ultimately, however, most businesses must realize a profit in order to survive.

ACTIVITY H. *Competition*

Competition involves contests among businesses producing the same or similar products or providing the same or similar services to attract consumers.

Competition among businesses has many advantages for the consumer. Businesses compete for consumers. Low prices attract consumers. Efficient or attractive products attract consumers. Thus, efforts to improve the product or service and/or to lower prices benefit the consumer.

The major vehicle which businesses use to communicate competitive advantages of their products or services is advertising. Advertising takes many forms and uses many media, the most common of which are television, radio, newspapers and magazines. Through advertising, businesses attempt to communicate the superiority of their product or service over that of their competitors. Advertising is, in fact, so important as a vehicle for promoting competition that it has attained the status of a major industry.

Open competition in a system of free enterprise is such an integral part of our economic system that it is protected by government legislation. With certain exceptions, monopolies – single business ownership of a product or service – are legislated against by the federal government, to protect each business' right to compete openly and to preserve the consumer's right to exercise free choice.

ACTIVITY I. *Risk*

The businessperson confronts many risks in conducting his day-to-day operations. The greatest risk is in going into business in the first place. One thousand new businesses are started every day in the United States. Two out of three do not survive the first year of operation, and four out of five do not survive the first ten years of operation. Much business failure results from inadequate planning and/or poor management. Improper selection of a product or service, insufficient market research, unrealistic estimate of costs, and inability to compete profitably are all common pitfalls. To insure against them, the businessperson must continually plan and organize all the activities of the business. Businesses view profits as compensation or reward for risk-taking.

In addition to the threat of failure, the businessperson must be prepared to survive possible losses involved in business operations. Fire, theft, forgery, shoplifting and death of a key executive are among the possible losses that a businessperson might face. The cost of such losses can be reduced through insurance. Insurance companies pay a pre-established sum to the insured party. The customer, commonly known as the policyholder, pays for this insurance. The payment is called the premium. Through insurance, the businessman can protect himself against a wide variety of possible risks except, of course, the risk of failure itself.

ACTIVITY J. *Forms of Ownership*

Businesspersons organize themselves in different ways. Some businesspersons want primary responsibility for management decisions and the rewards of the business for themselves. A business can be owned by one person. In a *sole ownership,* the owner can keep all the profits.

Other businesspersons go into business with one or more other persons. They may need to share the risk or find someone who can put up part of the money to start. They believe the business can be managed better if more than one person is making the decisions and several skills are combined. These people may form *partnerships.* In partnerships, the partners share in the profit. The amount of profit received by each partner is agreed upon by the partners themselves.

In a sole ownership and a partnership, the owners put up the money to start the business. Sometimes businesspersons decide to sell part of the ownership of the business to a few other people or to the general public. This type of business is called a *corporation.* A corporation is an artificial being created under the laws of the state in which the business is chartered. In the eyes of the law, the corporation is an individual. Like an individual it can make contracts, borrow money, own property, sue and be sued. However, the owners of a corporation are only liable as individuals for the amount of money each invested in the corporation. No one owner (shareholder) can be sued for the losses of the corporation. Because of this limited liability, the corporation is the favored form of business organization.

Some businesspersons want to operate their own businesses but do not have either the experience or capital to start their own from scratch. They may find that buying a *franchise* is preferable. A franchise is the license to operate a business, sold by a large parent company to an individual operator. The individual operator runs the business as his own. However, through the franchise he is able to use the parent company's trademark or symbol, get assistance from the parent company, and obtain supplies through central, volume purchasing. For example, many hamburger shops are franchises. They will look alike. They have the same sign out front. However, each is run by a different owner. Each owner bought a franchise from the parent company, receives help, gets meat at low prices, and must maintain the standards set by the parent company.

UNIT 11: COMMON SKILLS IN MARKETING AND DISTRIBUTION

Student Materials

OVERVIEW

ACTIVITIES	MATERIALS
A. *Interpersonal Skills*	
I. **Consumer service**. Learn the importance of consumer service by analyzing case studies.	Instructions and Eight Case studies
II. **Employee-Employee relationships.** Role-play situations requiring interpersonal skills in dealing with fellow employees.	Two sets of role profiles
III. **Employer-Employee negotiations.** Practice interpersonal skills by role-playing a conflict situation.	Instructions and store description. Two role profiles.
B. *Communications Skills*	
I. **Verbal communication**. Practice communications skills by giving presentations.	Instructions and List of Topics
II. **Non-verbal communication**. Demonstrate communication without words in a pantomime.	Product and occupation sheets
C. *Interpersonal & Communication Skills in Review*	
Assess interpersonal and communications skills of marketing and distribution employees through observation.	Instructions and Observation Guide
D. *Recordkeeping and Money Management*	
I. **Gina's Itinerary**. Examine and experiment with the need for recordkeeping in different marketing and distribution occupations.	Instructions
II. **Gina Sells**. Develop further understanding of recordkeeping and experiment with money management in marketing and distribution occupations.	Instructions and Sales Agreement Form

ACTIVITY A. *Interpersonal Skills*

I. Consumer Services

Instructions

This exercise focuses on serving the consumer. You are being asked to analyze how businesses and their employees serve their customers and what kinds of interpersonal skills are demonstrated by employees who do their jobs well:

1. Working in small groups, read, analyze and discuss each case study.
2. Choose the best solution from those listed after each case. Note that in Case Eight you are asked to answer the questions following the case description.
3. When you have finished, you will discuss your answers with the class.

CASE STUDIES

Case One:

Problem: John Bailey is about to open a new car dealership. He has ordered the cars from the distributor and now has to stock his service department with parts. He has never been in this business before and is uncertain about which parts to buy and how much of each he should buy. He goes to visit the wholesaler, Peter Meyer, to arrange for the purchase of the parts. He tells the wholesaler his problem (lack of experience in purchasing auto parts for a new dealership). What should the wholesaler do?

Possible solutions are:

1. Tell John Bailey that he can't help him if he doesn't know what he wants.
2. Take advantage of John Bailey's ignorance by selling him parts he doesn't need.
3. Turn the customer (John Bailey) over to an assistant.
4. Question John Bailey about the characteristics of the new car dealership.
5. Offer to go and visit the new car dealership.
6. Advise John Bailey on which parts to buy.
7. Advise John Bailey on how many parts to buy.
8. Suggest that John visit a similar car dealership to find out what parts they stock.

Case Two:

Problem: Clean-It Dry Cleaners is in the middle of its busiest time of day. The two clerks have their hands full trying to serve the twenty or more waiting customers. One of the customers is Betsy Smith who always takes a long time to serve because she gives detailed instructions on how her clothes are to be cleaned. It is Betsy's turn to be served, and she has a stain on one of her dresses that she wants special attention to be given to. What should the clerk do?

Possible solutions are:

1. Tell Betsy to wait while he/she serves other customers.
2. Ask Betsy what caused the stain.
3. Let Betsy explain how she wants the dress cleaned.
4. Tell Betsy that they give special attention to all their cleaning.
5. Tell Betsy that he/she doesn't have time to listen to her explanation.
6. Wait on other customers before waiting on Betsy.
7. Serve Betsy as he/she would any other time, when there are not a lot of people waiting.

Case Three:

Problem: Jones' Department Store is a very exclusive and expensive store. One of its departments is the watch department which sells only very fine and very expensive watches. Mrs. Ramos is the salesperson in that department. One day a very poorly-dressed woman approached the counter. She looked for a while at some of the watches on display. Then another well-dressed, chic woman approached the counter. What should Mrs. Ramos do?

Possible solutions:

1. Wait on the well-dressed customer first.
2. Wait until one of the customers asks to be served.
3. Alert the security guard.
4. Wait on the poorly-dressed customer first.
5. Show the poorly-dressed woman some less expensive watches.
6. Refer the poorly-dressed woman to another store.
7. Wait on the poorly-dressed woman and start by telling her the prices of some of the watches.

Case Four:

Problem: Renee's Beauty Shop has had a busy day. Not only have they had more customers than usual, but also one of the beauticians quit without giving any notice. As a result everyone, the two remaining beauticians and Renee (the owner), was slightly on edge and irritable. To cap things off, just as Renee was beginning to close up shop, another customer, who didn't have an appointment, came in. (Usually appointments are made at Renee's, but she often tries to serve customers without appointments if she can.) What should Renee do?

Possible solutions:

1. Tell the customer abruptly that she is closed for the day.
2. Refer the customer to another beauty salon.
3. Ask one of the two beauticians if they would take the new customer.
4. Explain to the customer in no uncertain terms that she couldn't expect to be served arriving at such a late hour with no appointment.
5. Tell the customer in a friendly and pleasant way that she couldn't help her but would be glad to make an appointment for another day.

Case Five:

Problem: Dixie's Department Store has an Exchange Department and a Customer Complaint Department. Bob Martin usually sits at the desk in the Customer Complaint Department. One day, a particularly irate customer comes to the desk. She had been to the Exchange Department and tried to exchange or return a sweater which had shrunk when washed. She had washed the sweater in a washing machine even though the label clearly specified that the sweater should only be dry cleaned. She yelled and cursed at Bob insisting that the shrinkage was due to the poor quality of the store's merchandise. Her language and whole manner were abusive. What should Bob have done?

Possible solutions:

1. Refer the customer back to the Exchange Department.
2. Get angry with the woman and tell her she is being unreasonable.
3. Get the manager of the Complaint Department to talk with the woman.
4. Pleasantly and firmly explain the store's policy to the woman.
5. Tell the woman it was her own fault for washing the sweater in the machine.
6. Try to arrange for the store to have the sweater steamed and blocked to see if they could get it back to its original size.

Case Six:

Problem: Bill Casper has just had an automobile accident. The front end of his new sports car is completely demolished. Bill is about to go to the insurance company office to make arrangements to have the car's repair paid for. He is overexcited and tense because, although the accident wasn't his fault (there is no 'no fault' insurance in his state), he had been so nervous that he had forgotten to take the names and numbers of any witnesses. At the insurance office he started to explain in a great rush of almost incomprehensible words what had happened. What should the insurance agent do?

Possible solutions:

1. Interrupt Bill and ask him to slow down.
2. Offer to get them both a cup of coffee.
3. Let Bill finish and then give him the appropriate forms to fill out.
4. Tell Bill it was a bad mistake not to get the names and numbers of the witnesses.
5. Tell Bill he is sure the company will pay for the damage to the car.
6. Let Bill finish and then question him in a reassuring way about the facts of the case.

Case Seven:

Problem: Ed Reston has just opened a new hardware store. He is both owner and manager of the store. He opened the store a week earlier than he had planned and, as a result, there are still some things left to be done. One of the things that has to be done is to put prices on all the items in the store. One of the clerks has been sick since the store opened, so Ed has been short-handed. On this particular day, things had been busy. Finally, at the end of the day, one slightly annoyed customer came up to him. She complained of the fact that the prices weren't marked, said it showed that the store was poorly managed and generally criticized the entire operation of the store What should he do?

Possible solutions:

1. Tell the woman she can shop elsewhere.
2. Explain in a calm and pleasant manner why the prices aren't marked.
3. Summon a clerk to shop with the woman and tell her what the prices are.
4. Get angry with the woman and tell her she's too critical; after all he's only been open a few days.
5. Admit that the woman has a point and tell her that, if she'll return in a few days, the prices will be marked.

Case Eight:

Janet and Fred Hodgins were shopping for a house. They wanted a two-story, three-bedroom, modern home. They want to be located in a suburban community; they also want at least a one-acre yard. They have three young children so they want to be located near an elementary school. They would also like to have a two-car garage. The price they're willing to pay is between 35 and 40 thousand dollars.

Homes, Inc. is the real estate agency for the Hodgins. They have shown the Hodgins the following homes:

1. A colonial style home which, except for the fact that it was colonial, fit all the Hodgins demands.
2. A split-level ranch-type home which was selling for $38,000. It had a two-car garage, was near an elementary school, had two bedrooms, a two-acre yard, and was in a suburban community.
3. A modern home near the center of the city which had three bedrooms, a two-car garage, a half-acre yard, and was near an elementary school. The asking price of the house was $44,000.
4. A modern home in a suburban community which had two bedrooms, a one-car garage, an acre of land around it, and was near an elementary school. It was selling for $40,000.
5. A modern, three-bedroom home which had a half acre of land, a two-car garage, was located in a suburban community, but was not near an elementary school. The asking price was $33,000.

QUESTIONS FOR DISCUSSION:

1. Were any of the houses shown to the Hodgins unresponsive to their requests? If so, which ones, and why?
2. In this exercise, what can be said about what it means to be responsive to customer requests?
3. Can you think of other examples where the principles demonstrated in this exercise apply?

II. Employee-Employee Relationships

Instructions

In this Activity, you will play the role of someone caught in a situation of conflict at work. Try to understand the point of view of the employee you are playing but remember that the goal of both "sides" is to maintain a constructive, pleasant relationship in the work situation. Whatever your personal opinion may be, try to solve this problem as the person you are playing would.

ROLE PROFILES

Sandy Redwick

You are an employee in an advertising agency. You share an office with another employee, Gale Jones. You have the same jobs and report to the same supervisor.

Gale Jones smokes two packs of cigarettes a day. You do not smoke; in fact, you gave it up two years ago. You are finding the smoky atmosphere in your small office increasingly offensive, and you want to do something about it. The building superintendent does not allow windows to be opened because it upsets the heating-cooling system. Your supervisor, who can be irritable at times, also smokes. Your job, and Gale's, requires mostly desk work so you do not move around much during the day. There are no vacant offices. You have decided to talk with Gale about the problem.

Gale Jones

You are an employee in an advertising agency. You share an office with another employee, Sandy Redwick. You have the same job as Sandy and report to the same supervisor.

You smoke a great deal: about two packs a day. Most of your family and friends smoke, and you have smoked since you were eighteen. You have never thought about giving it up much because you like to smoke and you know it would be difficult for you to stop. You smoke at your desk a lot because you spend most of your work day there.

Your office-mate, Sandy, does not smoke and you have an idea that it bothers Sandy when you do. Now Sandy wants to talk with you.

Pat Olson

You work in a large furniture store. Recently you have been late for work several times and absent on several occasions. Your employer is not aware of the extent of your absences because another employee, Chris Widmark, has covered for you. You are both salespersons in this large store, and when you are not there, Chris will serve your customers as well as his/her own.

You have reasons for your latenesses and absenteeism. Your spouse is in the hospital so that you have to do all the housework instead of dividing it as you did when your spouse was well and working. Especially difficult for you is taking care of the children since the babysitter quit. You have to take the children to school and daycare, etc. You are trying to make other arrangements to take care of these things.

You have already offered to cover for Chris in the future if he/she is absent. Now Chris wants to talk with you.

Chris Widmark

You work as a salesperson in a large furniture store. You have recently been doing the work of two people because a fellow salesperson, Pat Olson, has often been late or absent from work. You know that there may be good reasons for the latenesses and absences, but you are getting tired of covering up for Pat. You feel that by taking care of Pat's customers, you are not giving enough time to your own. In addition, you do not want to be put in the position of lying to the boss if you are asked where Pat is.

At the same time, you want to help and do not want to report Pat. You have decided to talk with Pat about how you feel.

III. Employer-Employee Negotiation

Instructions

In all types of businesses, situations occur where employees feel that they have not been dealt with fairly by the management. In this exercise you will be involved in a meeting between a manager and an employee. The employee is upset by recent actions, and lack of action, on the part of the manager. The purpose of the meeting is to resolve the conflict between the employee and the manager.

In this situation, an employee requests to speak to the manager about recent managerial decisions which affected the employee. The employee and the manager would like to resolve the issues to their mutual satisfaction. They would both like to leave the meeting feeling satisfied with the resolution and feeling that the other person has listened. The manager would like to keep a valued employee happy, and the employee would like to be assured that a similar situation will not occur again.

In this exercise, the employee and employer, represented by class members, meet to discuss the problem.

1. You are assigned to a team. One team will discuss the role of the employee and the other team will discuss the role of management.
2. You will be given a description of the company and a description of the issues to be discussed.
3. The employee team will be given a description of the employee's views on the issues. The manager team will be given a description of the management's views on the issues.
4. Each team must thoroughly discuss the issues and agree upon their viewpoints before negotiating with the other team.
5. In this initial team meeting, you should also set priorities for each issue. That is, you should decide which issue is most important to you.
6. In addition, in this initial team meeting, you should discuss what compromises you might make with the other team. For example, as a manager you might offer to post jobs in the future, if the employee will not demand more salary now.
7. Prior to meeting with the other team, choose one member of the group who will represent the group's views and role-play the position discussed by your group.
8. In the meeting between the employer and the employee, the manager and the employee should compromise on issues.
9. During the meeting between the employer and employee, you or your team members may call for a recess to discuss issues and suggestions with your spokesperson.
10. The spokesperson should not make up any facts that are not presented in the profiles.
11. Remember: The purpose is not to see how hard a bargain you can drive, but whether you can reach an agreement which is equitable to both parties.

ROWE'S DISCOUNT DEPARTMENT STORE

Rowe's Discount Department Store in Yourtown is one of four hundred stores of the Rowe chain. This store opened four years ago in a shopping center and employs fifty people. The store departments include hardware, linens, household items and stationery supplies. There is also a snack bar which is operated by a private concessionaire.

The management of the store consists of a manager, an assistant manager and a head cashier. The remainder of the employees are sales personnel, stock help and cashiers.

The store manager has been manager of Rowe's Stores in various locations for twelve years. Previous to the manager's experience with Rowe's, he/she was an assistant manager for Johnson's, another large discount department store chain. The assistant manager, Frank Carnduff, has been at the store for two years, is on a management training program and will become manager of a new Rowe store that is presently under construction. The head cashier has been with the store since it opened and is a very competent, reliable employee.

Because of increased business and an increase in the number of hours that the store is open, a second assistant manager has been hired. Although the person has no previous experience in a retail store, the person has had experience in sales and was head teller in a local bank. The assistant manager will assist with employee supervision and preparation of reports. The new assistant manager was hired last week.

The head cashier is upset about the hiring of the new assistant manager and wants to speak to the manager about it.

ROLE PROFILES

Rowe's Discount Department Store: Head Cashier

You are the head cashier at Rowe's Discount Department Store, a large discount department store located in Yourtown. You enjoy working at Rowe's and have worked at this store since it opened four years ago. Prior to working at Rowe's, you were a department head in Colgate's, a local specialty store. You are well-liked by the customers and employees and live close to the store.

Because of increased business and the increased hours that the store is open, the store manager has hired a second assistant manager.

You were not told that a second manager would be hired; and you were not, as far as you know, considered for the opening. You are interested in advancement and increased salary and are upset that you were not informed of, or considered for, the opening. You feel that there is no incentive for present employees if job openings are not posted. You have had four years experience in the store and have done well, and your efforts should be rewarded. You have asked to speak with the manager and you want to let him/her know that you are unhappy and would like some assurances that a similar situation will not develop again.

You would like:

- all future job openings posted in the store, so that all employees can apply.
- a new position of assistant-manager trainee (with a $15 weekly raise above your present rate) created for you.
- an on-the-job training program created so that you will be able to develop the increased skills for management.
- periodic salary increases as you progress through this training program.
- to be offered the assistant manager position that will open when Frank Carnduff leaves to become manager of another Rowe store.

ROLE PROFILE

Rowe's Discount Department Store: Manager

You are presently the manager of Rowe's Discount Department Store in Yourtown. You have been a manager for Rowe Discount Stores for ten years and have been at the Yourtown store for the past two years. You are well-respected and liked by the customers and employees.

An assistant manager and head cashier have assisted you with your managerial duties. Frank Carnduff, the assistant manager, has also been at the store for two years and will be leaving within the year to assume the position of manager for a new Rowe store that is presently under construction. The head cashier is a very competent, well-liked employee who has been with Rowe's Yourtown store since it opened four years ago. Previous to the head cashier's association with Rowe's, the head cashier was a department head in Colgate's, a local specialty store.

Because of increased sales and the increased number of hours that the store is open, you have hired a second assistant manager. You placed an ad in the local newspaper, interviewed several people and hired a person who started last week.

You did not inform present employees about the opening because you wanted to get a person who was not associated with Rowe's, who could provide a "fresh look" at the company.

The head cashier is quite upset that she/he was not informed about the opening, or considered for the position. She/he has asked to speak with you and is entering your office now.

The head cashier is a very valuable employee and you are concerned that she/he is upset. You would like to do what you can to make her/him less upset. However, the new assistant manager is being well-paid and his salary depletes the amount of money available to provide salary increases for the head cashier. You will also be very busy training this new assistant manager; and, consequently, you will not be able to train other employees now.

You cannot guarantee the head cashier an assistant manager position but are willing to consider her/him for the job.

ACTIVITY B: *Communication Skills*

I. Verbal Communication

Instructions

Communication skills are important in all of life's activities, and certainly in marketing and distribution occupations.

This exercise will give you a chance to practice these skills.

1. Choose a topic that you would like to speak about. You may choose any of those listed or another similar one developed by the class.
2. Prepare a brief, 2-3 minute presentation on your topic. Remember to keep it short!
3. When preparing and making your presentation, and when assessing the presentations of others, remember to note:
   - the major point of the presentation
   - the clarity of thought expressed
   - the clarity of speech
4. Be sure any comments you may have on other presentations are helpful.

Suggested Topics: Which One Do You Like?

An Effective Television Commercial

Select a television commercial which is especially effective and explain why it is an effective ad.

Consider who it is meant to appeal to; its visual and aural qualities; what characteristics the ad suggests users of the product have; etc.

Product Comparison

Choose a product and compare two or three competing brands of the product from the point of view of the consumer. Emphasize strengths and weaknesses of each competing brand (including quality and price) and make a recommendation as to which the consumer should buy.

Job Comparison

Compare two classified advertisements for the same occupation and explain which, if either, appears more desirable to you from the description in the newspaper.

Store Comparison

Compare two supermarkets in your community in terms of size, prices, range of products offered, services offered, etc., and indicate which, if either, offers more to the consumer.

Consumer Needs

Compare two types of restaurants and explain why the same consumer might patronize one type on a given occasion and a different type on another (e.g., fast food place for lunch; luxury for a special occasion).

II. Non-Verbal Communication

Instructions

The purpose of this exercise is to develop your awareness of the the fact that there are more ways of communicating than by speech alone. In this exercise, you will practice using gestures and facial expressions to communicate words. This is called pantomiming.

1. The class is divided into teams.
2. Members of each team take turns pantomiming a marketing and distribution product or occupation.
3. The other members of the team tries to guess what the product or occupation is.
4. Each member draws the name of the product or occupation he is to pantomime from a hat (or other suitable container).
5. The person doing the pantomime cannot give clues by talking, mouthing the word, spelling out the word, or using props. All cummunication must be non-verbal, except at the beginning of the pantomime when you tell your team members if it is a product or occupation you are acting out.
6. The time limit for each pantomime is five (5) minutes.
7. If the team guesses the product or occupation within five minutes, they score a point.
8. The team with the most points at the end of the game wins.

ACTIVITY C. *Interpersonal and Communication Skills in Review*

Instructions

In this exercise you will be observing the communications and interpersonal skills of people who work in marketing and distribution occupations.

1. Your teacher has divided the class into teams of 2 or 3 students.
2. Your team will select the type of business and specific occupation you wish to observe and, with your teacher's help, will make any necessary pre-visit arrangements.
3. Read your Observation Guide before your visit.
4. During or after your visit, complete the Guide.
5. When the teams have finished, the class will discuss the effective and ineffective behaviors each team observed.

OBSERVATION GUIDE: Interpersonal and Communication Skills

Type of Business ____________________

Employee's Occupation ____________________

Does the employee deal primarily with the consumer? ______ other employees? ____________

What tasks does the employee perform? ____________________

____

____

Does the employee:

Greet the customer? ____________________

Speak directly to the customer? ____________________

Assist the customer? ____________________

Serve the customer promptly? ____________________

Answer questions? ____________________

Attempt to satisfy customer requests? ____________________

Keep customers waiting? ____________________

Speak to other employees: between customers? ____________________

while customers are waiting? ____________________

Talk on the telephone on personal matters? ____________________

Walk away from his or her place to chat with other employees? ____________________

Speak softly but clearly and courteously? ____________________

Thank the customer after a sale is complete? ____________________

Argue with the customer? ____________________

Refuse to help? ____________________

What is the best action by the employee you observed? ____________________

____

____

What is the worst action you observed? ____________________

____

ACTIVITY D. *Recordkeeping and Money Management*

I. Gina's Itinerary

Instructions

You are Gina Wheatley, a typewriter sales representative for a medium-sized corporation. As a sales representative, your tasks and responsibilities include:

- identifying potential customers
- explaining and demonstrating the potential benefits of using your typewriters to a company
- firming the sales agreement between the company and customers, including the transaction of money
- submitting the necessary documents to your sales manager and to the Production Department after the sale has been completed.

Your job, therefore, requires that you be not only knowledgeable about interpersonal and communication skills, but also efficient and accurate in maintaining records and handling money. If you are efficient, you can meet with many potential clients. Since much of your income is derived from commission in sales (e.g., for every sale you make, you receive a certain percentage of that amount), the more people you can see, the better chance you have of making the sales.

You have discoved that in the past you have spent a great deal of your time in travel due to poor planning. For example, your territory (the part of the city which has been assigned to you for sales) covers a large geographic area. Frequently you have been spending a lot of time driving back and forth across your territory. Also, you have been calling in to the office every time you arrive at a new visit to make certain that your manager and secretary are aware of your whereabouts. Therefore, you have decided it would be more efficient if you develop an outline for planning your visits for the week which can be duplicated – one copy for you, one for the use of your manager and secretary.

The first thing you need to do in developing this form is to determine what items of information should be on it. Once you have identified the items of information that should be on the form, you can then develop the form. It is important that the form is efficient and easy to understand.

You and your team members should first list out the items of information which Gina Wheatley should include on her form. Then, develop a form which presents these items in the most efficient and easy-to-read manner.

II. Gina Sells

Instructions

In making a sales transaction, Gina must be certain that she is both efficient and accurate. The sales agreement is used by Gina's company to 1) record the quantity and model of typewriters that need to be ordered and delivered to the customer; 2) to record the amount of money to be billed to the customer; 3) to record the amount of commission to be received by the sales representative; and 4) to identify the method of payment by the customer.

Gina sells 4 basic models of typewriters:

1. *Luxury Model, No. AA:* This typewriter is the top of the line. It is very fast and gives a pretty copy, the letters are proportionally-spaced as in printed copy (such as published books). This typewriter is often used by companies which are concerned with a printed look and easy-to-read copy, such as law firms. The cost of the Luxury Model is $400.
2. *Fast N' Fun Model, No. AB:* This typewriter is extremely fast (faster than the Luxury Model). However, the copy is not as sharp as the top of the line. This typewriter is usually used by companies which have to produce a large number of typewritten pages, such as an insurance company. It costs $325.
3. *Basic Model, No. ABB:* This is the original typewriter developed by Gina's company. It is not as fast and efficient as the other models. It is usually used by firms which have some, but not many typed pages in the course of their business, such as a clothing store. The cost of the basic model is $250.
4. *Used Typewriters, No. BC:* Gina's company also sells used typewriters to firms which need many machines for rough copy. A used typewriter sells for $175.

In addition, for those customers that are interested in purchasing a maintenance agreement (i.e., an agreement that Gina's company will send repair persons to service the typewriters if anything goes wrong with them over a period of a year) the cost is $200.

On the sales agreement, Gina records the type of model sold, the quantity of each model sold (e.g., 4 Luxury Models), the unit cost of each type of model (e.g., $400 for the Luxury Model), the total costs for each type of model (e.g., 4 Luxury Models at $400/unit equals $1600), and the total amount of money to be billed to the customer.

Included on this form is the method of payment which the customer chooses (e.g., 30 days; 90 days; 12 months). Persons who pay in 30 days receive a 10% discount on the total cost. Many of Gina's customers lease the typewriters (they pay a monthly rate for the use of the typewriter) instead of purchasing them. If they continue to lease over a certain period of time and decide to buy, the money paid for rent (lease) goes toward the cost of purchasing the typewriter.

The sales agreement also provides a means for recording Gina's commission on each sale. She receives a 15% commission rate on all new typewriters, a 10% commission rate on used typewriters, and a 5% commission rate on maintenance agreements.

Directions: For each of the cases, you should complete the sales agreement, and

a. calculate commission earned by Gina
b. what the customer pays.

Case 1: **DooLittle Co., Inc.**

Mr. DooLittle, president of the DooLittle Company, has decided to purchase 2 Fast N' Fun typewriters, 1 Basic typewriter, and a used typewriter from Gina. Mr DooLittle is not interested in the maintenance agreement. He will make payments for these typewriters over one year.

a. Fill out the sales agreement for DooLittle Co., Inc.
b. How much is his bill?
c. What is Gina's commission?

Case 2: **Greenbriar Farms, Inc.**

Susan Smith, the office manager for Greenbriar Farms, does not believe the company needs many typewriters. However, she feels it is important that the Company have the latest models and that the typewriters be maintained in top shape. Therefore, Susan has ordered 2 Luxury typewriters, and a maintenance agreement. Susan is paying for the typewriters in 30 days.

a. Fill out the sales agreement for Greenbriar Farms, Inc.
b. How much is the bill?
c. What is Gina's commission?

Case 3: **Larsen and Schmidt Accounting Firm**

Larsen and Schmidt is a very large and reputable accounting firm located in Gina's territory. They have decided to convert all of their typewriters to Gina's company's brand. Therefore, they are ordering 50 Luxury typewriters, 75 Fast N' Fun typewriters, 100 Basic typewriters, and 20 used typewriters. In addition, they have decided to purchase a maintenance agreement. Larsen and Schmidt will pay over 12 months.

a. Fill out the sales agreement for Larsen & Schmidt.
b. How much is their bill?
c. What is Gina's commission?

SALES AGREEMENT

____
(Date)

____
(Name of Client)

____
(Name of Sales Representative)

Model No.	Quantity	Description	Cost/Unit	Total Cost
		TOTAL		

FOR ACCOUNTING USE ONLY

Commission ____________

Method of Payment:
____________ 30 days
____________ 90 days
____________ 12 months
____________ lease

UNIT 12: PROBLEM-SOLVING IN MARKETING AND DISTRIBUTION

Student Materials

OVERVIEW

ACTIVITIES	MATERIALS
A. *The Big Picture* Prepare a promotional campaign for a new movie.	Case Study. Supply of 8 1/2" x 11" plain paper.
B. *Store for Rent* Roleplay a real estate agent who assists a florist in the location of an appropriate store.	Real Estate Role Description. Florist Role Description.
C. *Is It Worth It?* Consider the pressures on the district manager of a supermarket chain and gain experience with management decisions.	Case Study.
D. *Change the Station* Develop buying skills as "time-buyers" in an advertising agency.	Case Study and Rate Cards.
E. *What Do Our Customers Want?* Develop basic research skills as you design a market research questionnaire for an airline.	Case Study.
F. *Which Way Do We Pay?* Make a management decision concerning employee's salary conditions.	Case Study.
G. *Eyewitness News* Interview and observe individuals to determine their responsibilities and tasks.	Instructions and Interview Form.

ACTIVITY A. *The Big Picture*

Instructions

Your group will be Estella Lewis's staff. You will have to design and present a promotion campaign for a new movie called CRAZY CAR.

Case Study

Estella Lewis is the Promotion Directior for Commonwealth Pictures, a major distributor of popular films. As Promotion Director, Estella supervises a staff of seven people who are responsible for the creation of advertising, press releases and special promotions for the movies that Commonwealth Pictures distributes. An aspect of Estella's job that she enjoys most is artist relations – escorting the actors and actresses to special openings and interviews on television and radio programs.

Estella must make decisions about the sales promotion activities which will bring more movie-goers into the theaters to see the movies distributed by her employer. For a recent movie about dinosaurs entitled "Rex", Estella and her staff designed newspaper and magazine advertisements, arranged for a grand opening on Broadway in New York City, and held press parties (with dinosaurs) in major Museums of Natural History across the country.

Recently, Estella has been given an assignment to come up with the sales promotion campaign for a new children's comedy called "CRAZY CAR". The movie is about a small car that doesn't need a driver. The car automatically goes wherever the passengers tell it to go. The car automatically signals, slows down, makes turns without *any* operation by the passenger. Estella laughed throughout the whole movie. The reactions of other drivers were something to see. The movie stars three fifteen-year-olds who have never been in a movie before.

One of the movie producers will be in to see the sales promotion ideas in a couple of days. In the meanwhile, Estella has asked your group to assist her in designing the sales promotion components of the campaign. The campaign should include:

1. Slogan for the movie. For example, "KIDS CRAVE CRAZY CAR."
2. A list of ideas for radio and TV commercials.
3. An actual newspaper advertisement.
4. Special displays, either at theaters or other locations.
5. Special promotional activities.
6. Special TV appearances or publicity parties.

Be sure to use your imagination in this activity. List and describe all of your ideas on a piece of paper. You should write out the newspaper advertisement. In coming up with sales promotion ideas be as specific as possible. For example, if you choose special appearances for the stars, list the name of the television show on which you would like to arrange the special appearance.

ACTIVITY B. *Store For Rent*

Instructions

In this activity you will play the role of a Real Estate Agent helping a Florist looking for a store to rent. Read your role description and instructions and advise the Florist.

Role Description – Real Estate Agent

Dana Johnson is in business as a Real Estate Agent in the town of Hopevale. You had previously been a real estate salesperson with one of the larger agencies in town. However, you decided to start your own business so that you could make more money and have more flexibility in your schedule. As owner of your own agency you sell homes, rent apartments, sell industrial buildings and rent stores to other businesses.

The town of Hopevale has approximately 75,000 residents. There are shopping areas in each of the three sections of town: **Hopevale Center**, which is the middle income section of town, is the largest; **Hopevale Falls**, which is the upper middle-income section, has only twelve stores; **Hopevale Hills**, which is the upper income section of town, has a shopping area of about twenty stores.

You try to match up property sellers or landlords with buyers or renters. You spend about one-fourth of your time getting listings of property for sale or rent. These listings describe the properties that are available. The rest of your time is spent showing these listed properties to people who are interested in buying or renting. When you take a listing on a property you try to get as much information as you possibly can. Sometimes you take a picture of the property to include in the listing. With a complete listing you can show customers the written listing before arranging to show them around the property itself. When people who are interested in buying or renting come into your office you try to find out as much information as possible about their needs and interests. In this way you are able to determine which of your listings may be appropriate for the client. Then you show the clients the appropriate listings before visiting properties. You work with the client in deciding which properties to visit and rent or buy.

This afternoon you have an appointment with Rae Hannon, who is going to be opening a florist shop in town. You have several listings which may be of interest to Rae. When Rae comes in, try to find out more about what a florist needs and then show some of the written listings of properties. When you know Rae's needs, you then want to visit some of the properties which interest Rae so that a decision can be made soon about which property to rent.

In this activity you will be playing the role of Dana Johnson. Review the Listings on the next page of various properties available for rent. When Rae Hannon comes in, you should:

1. Introduce yourself.
2. Ask questions to find out more about what a florist needs.
3. Describe properties which you think would be appropriate.
4. Decide together which properties should be looked at on-site.

LISTINGS

Address: 340 Lucerne Avenue, Hopevale Center
Rent: $ 350 per month
Size: 3,000 square feet
Location: About one mile from Hopevale Center shopping district
Water: Included in rent
Heat: Included in rent
Layout: In small neighborhood shopping block. Other building occupants are a pet store and a variety store. Parking spaces available.

Address: 11A Crown Point Drive, Hopevale Hills
Rent: $ 900 per month
Size: 4,000 square feet
Location: Right in center of Hopevale Hills shopping area
Water: Included in rent
Heat: Included in rent
Layout: On street level next to department store. Parking in rear. Presently occupied by insurance agency.

Address: 32 Bobolink Road, Hopevale Hills
Rent: $ 550 per month
Size: 2,000 square feet
Location: In center of Hopevale Hills
Water: $ 12.50 every two months
Heat: $ 80 per month
Layout: Street floor, in building with three other stores.
Other Information 3 parking spaces reserved for customers.

Address: 381 Stoughton Street, Hopevale Falls
Rent: $ 420 per month
Size: 3,000 square feet
Location: In center of Hopevale Falls
Water: $ 20 every 2 months
Heat: $ 80 per month
Layout: In center of Hopevale Falls next to restaurant and shoe store. On ground level, 15 feet of display windows. Parking available in rear. 1 large store and small room in back.

Address: 1318 Stoughton Street, Hopevale Falls
Rent: $ 400 per month
Size: 4,000 square feet
Location: About 1/4 mile away from Hopevale Falls Business District.
Water: $ 20 every 2 months
Heat: $ 60 per month
Layout: On street floor. Small back room. 20 feet of street front. Parking out front. Plenty of land in back.
Other Information Owner may consider selling.

Address: 315 Elm Street, Hopevale Center
Rent: $ 450 per month
Size: 5,000 square feet
Location: Off downtown area
Water: Included in rent
Heat: Included in rent
Layout: On second floor. Tuxedo rental on first floor. 1 large long room.

Instructions

In this activity you will play the role of a Florist looking for a store to rent. Read your role description and seek advice from the Real Estate agent.

Role Description – Florist

Rae Hannon has recently moved to Hopevale from Boise, Idaho. In Boise you operated a very successful florist shop and you intend to open one in Hopevale. You have made the necessary arrangements with suppliers and feel that a florist shop could do well in town. You think that your chances for success are great since there is only one other florist shop in this town of 75,000 people. This other florist shop is owned by a person who does not know very much about flowers, and many of the people in town go to other communities when they need flowers. You majored in Horticulture at a junior college and are quite knowledgeable about plants, flowers and flower arranging.

You would eventually like to buy a building that had a room which you could use for a florist shop and that had space in which to build greenhouses in the back. However, since you are just getting started in this town, you have decided to rent a store to begin with. You would like to rent a store in one of the shopping areas in town, of which there are three – Hopevale Falls shopping area, Downtown or Hopevale Center shopping area and Hopevale Hills shopping area. Your preference would be to rent a store in the Hills shopping area, since the wealthier people in Hopevale live in the Hills area. You would prefer not to rent in the downtown area since that is where the other florist is located. You have also considered the Falls shopping area, but although the people in the Falls area are middle-income, there are not very many stores in the area, and you would rather be located in a business shopping area to attract walk-in business.

Along some of the major roads in town there are located some stores that are not connected to any shopping district. You might also consider renting one of these as long as adequate parking is available.

You can afford to spend a total of $500 per month rent, including water and electricity, for a place that has a least 3,000 square feet. You feel that you cannot afford much more than this, since you will have to make a considerable investment in plants, flowers and refrigerated cases.

You are on your way to see Dana Johnson, a Real Estate Agent in town. Dana has a reputation as a reliable real estate broker and has several properties available for rent which may be of interest to you. When you meet with Dana:

1. Introduce yourself and explain what kind of property you are looking for.
2. Look over the listings of properties which may be appropriate for you needs.
3. Decide in conjunction with Dana which properties you should visit with the agent because they best meet your needs.

ACTIVITY C. *Is It Worth It?*

Instructions

This activity asks you to make an important management decision. Read the case below and try to advise the manager on what to do. It describes a manager under pressure from customers, unionized employees, consumer groups and store managers.

Steve Edwards, Save-Well Supermarkets

Steve Edwards is the District Manager for the Save-Well Supermarkets, a small chain of six supermarkets in the Southwest. As District Manager Steve supervises the supermarket managers in the operation of their stores. He provides assistance in the organization and management of the supermarkets. Steve visits each of the supermarkets weekly and talks with the managers about sales of various products, personnel problems, the display of the store's merchandise and the services that the supermarkets offer. He had previously been the manager of the Save-Well Supermarket in Hopedale and was promoted to District Manager a year ago.

Each of the supermarkets that Steve supervises does an average of $10 million dollars per year in business. Each store also has five electric cash registers to check people out when they shop. Recently, the store managers have been reporting an increase in customer complaints about the slowness of the check-out process. The managers have told Steve that he should consider replacing the electric cash registers with a system that could check people out more quickly. The managers have assured Steve, and he has also observed, that the cashiers are not the problem – they are doing their job properly.

Steve is concerned that business may decline if the check-out procedure is not speeded up. He had considered adding an additional check-out lane to each supermarket. However, there is not enough space in the supermarkets for any additional lanes.

For the past year Steve has been following the development of a new type of check-out system called the scanner. With the scanner, it is not necessary for the cashier to ring up each item on the cash register. Rather, each item is coded with a Uniform Product Code (U.P.C.) which identifies the product. A store computer (or one located in the district) stores the prices for the items marked with the various codes. When the customer comes to the check-out lane he simply puts the items on the conveyer belt, and the items pass over the scanner which automatically records the price of the item. Perhaps you have already seen items marked with U.P.C. The marks look like this: |||||||||||||| Every item available for sale, including magazines, is marked with a different code. This code represents the product number. Each supermarket can record the price of the various items by putting the price information into the supermarket's computer.

Steve feels that the "scanner system" would certainly make the check-out process quicker since the cashier would only have to make sure that the items ran over the scanner properly – the cashier would not have to record each item on a cash register. Steve also feels that there would be other advantages to this system. First, he could save money by eliminating baggers. Since the cashiers would no longer have to record the items, the cashiers could now bag. Second, he could save money by eliminating some of the jobs in the grocery crews – the people who stock the shelves and mark the merchandise. Since the computer has all of the price information, the price of the item would not have to be marked on the item itself. Also, price changes which take extra work to mark on sale items or those that have gone up could now be changed in seconds just by changing the prices in the computer.

Steve has discussed the "scanner system" with the six supermarket managers in a recent meeting. Each of them thinks that it is an excellent system. They feel that the "scanner system" will bring their operating costs down and would also speed up check-out.

Steve showed them the cost information for the system. The initial cost for the system is expensive. The "scanner systems" cost considerably more than the cash registers that are now in use. The cash register salesperson for the "scanner system" has told Steve that although these initial costs are high, the cost of the "scanner system" is actually lower over the long-term because there would be considerable savings in personnel costs. The salesperson also pointed out that if Save-Well adopts the new "scanner system," it would get a reputation as a leader in the supermarket field.

Although the store managers are pleased with the prospects of the new system, there are two groups that are not happy that Save-Well is considering the new "scanner system": the unions and consumer groups.

The union is concerned that jobs will be lost, since baggers will be eliminated and some jobs on the grocery crew will be lost. The union also feels that the new system would take less skill to use than the current system. Cashiers could be replaced with less skilled personnel; and, consequently, cashiers would end up out of work. The union has threatened to go on strike if Steve installs the new system. They might agree to the new system if Save-Well guarantees that no people would be laid off or have their hours curtailed.

Several consumer groups have also written to Steve and the store managers, indicating their displeasure with the new proposed system. They feel that the system is poor for the consumer in two ways. First, the elimination of prices on the items will make it difficult for consumers to figure out what the costs of the items are. Although Steve has assured them that the prices would be posted on shelf tags or signs, the consumer groups feel that this would not be adequate, since the signs frequently get misplaced or are difficult to read. Second, the consumer groups felt that there will be too many errors. Should the computer be programmed incorrectly, the consumer could be charged too much money for certain items. For example, if a product was selling for 89¢ and the computer was mistakenly programmed to have the item selling for $1.89, customers could be incorrectly charged an additional dollar each time they pruchased that item.

Steve believes that errors will be few, but the store will make good on any that do occur. Besides, the system may be best for consumers because costs may go down if the market can do more business with the same amount of help. The consumer groups, however, do not believe that this will be the case.

Steve is interested in making a decision as soon as possible.

- If he decides to put in the new system, what is likely to happen?
- If he decides not to put in the new system, what are other alternatives for speeding up the check-out process?
- In this situation you are advising Steve Edwards.
- Would you recommend that he implement the new system? If so, how should he handle the consumer groups? How should he handle the union?
- If you recommend against implementing the new system, how would you handle the supermarket managers who want a more rapid check-out process?

ACTIVITY D. *Change The Station*

Instructions

In this activity you will take the part of a media buyer faced with buying advertising time for a motorcycle dealer. You must consider not only the market for motorcycles, but also the budget for advertising. Read the Case Study and answer the questions following it.

Case Study – Media Buyer

Ben Richmond is the media buyer for the Pamela Joy Advertising Agency. As media buyer, Ben decides where the advertisements for his clients will be placed. He must decide where, i.e., in which magazine, radio program, newspapers, billboards, or television program, the ads created by the agency will be placed. When he places an ad in a newspaper or magazine, this is called "buying space", since he is buying space in the newspaper or magazine. When he places a commercial on the radio or television, this is called "buying time" since he is buying air time for the commercial.

When Ben buys time or space he must tailor it to the market that his client is trying to reach. He must also be aware of the market that the publication or program is trying to reach. He places advertisements so that his client can reach potential customers. For example, if one of Ben's clients is the manufacturer of children's toys, the company's potential clients are young children and their parents. Therefore, Ben may decide to buy time on a program geared for children, such as the Saturday morning cartoons.

Ben has certain resources and directories available to assist him in his decisions. These directories provide:

- Descriptions of the audiences for various publications and shows.
- Information on the costs per minute or per advertising page.
- Descriptive information on the various programs and print media available.

One of the agency's customers is the Mondo Cane Motorcycle Company, which sells and services three major brands of motorcycles.

In this exercise you will be playing the role of Ben Richmond and making decisions similar to those which Ben has to make. However, since you do not have the resources which Ben has available, you will have to make your own judgements about the clients which Mondo Cane would like to reach and the characteristics of the programs on which Mondo Cane could advertise.

On the next page are representations of "rate cards" which provide information on the programs and costs of advertising on three different radio stations.

RATE CARDS

Station: WYND
Type of Programming: Easy listening. News every half-hour.

SCHEDULE

Time	Type of Program	Cost per minute
Midnite to 6 AM	MUSIC	$ 50
6 AM to 9 AM	MUSIC	$ 100
9 AM to NOON	MUSIC	$ 80
NOON to 4 PM	MUSIC	$ 70
4 PM to 6 PM	NEWS	$ 100
6 PM to 9 PM	MUSIC	$ 70
9 PM to Midnite	POLITICAL TALK SHOW	$ 65

Station: WJXF
Type of Programming: Oldies But Goodies. News every hour.

SCHEDULE

Time	Type of Program	Cost per minute
Midnite to 6 AM	MUSIC	$ 60
6 AM to 9 AM	MUSIC	$ 90
9 AM to 3 PM	MUSIC	$ 70
3 PM to 6 PM	MUSIC	$ 80
6 PM to 8 PM	SPORTS TALK SHOW	$ 80
8 PM to Midnite	OLD RADIO SHOWS	$ 80

Station: WPJT
Type of Programming: Top Forty Hits. News every hour.

SCHEDULE

Time	Type of Program	Cost per minute
Midnite to 6 AM	TALK SHOW	$ 70
6 AM to 9 AM	MUSIC	$ 120
9 AM to NOON	MUSIC	$ 100
NOON to 4 PM	MUSIC	$ 90
4 PM to 9 PM	MUSIC	$ 110
9 PM to Midnite	MUSIC	$ 100

In this Exercise

1. Decide who the potential customers for Mondo Cane Motorcycle Company are. ____________

   ____

2. Review the information on the rate cards. Decide which stations are appropriate for reaching this market. Decide which times are best for reaching this market.

3. Assume that you have a total of $ 1,000 for advertising this week. At what time(s) on which stations would you advertise? Record your answers below.

STATION	TIME	NUMBER OF MINUTES	COST PER MINUTE	TOTAL

ACTIVITY E. *What Do Our Customers Want?*

Instructions

Read the case and further instructions below.

Case Study – Hector Jones

Hector Jones is employed as a Market Research Analyst with Aviator Airlines. As a Market Research Analyst, Hector has conducted a number of research projects including a study of the characteristics of passengers who fly Aviator and a study of passengers' food preferences.

Aviator's Vice President in Charge of Sales Promotion has recently talked with Hector about a proposed plan to offer lower fares for people who are willing to do without having meals served to them in-flight. The proposal is that full-fare passengers will still be served meals and beverages. Reduced fare passengers will be permitted to purchase beverages, but no meals will be served.

The company management is divided on whether to implement this plan. Those who favor it think it will attract more non-business travelers with limited budgets. Especially if the plan is offered only during off-peak hours, the airline will be able to fill more seats. This is important for business since the costs of flying the plane with one passenger or with one hundred are about the same, but the earnings are obviously greater with one hundred. Selling seats is the company's business.

Those who oppose the plan fear that the image of the airline will be hurt by the plan. They argue that the company's principal client – the business traveler – won't buy the plan and will not want to fly on a "bargain basement" flight. They also say that those who buy reduced fare tickets will, in fact, dislike the idea when they see others being served. They fear even the customers who freely choose the plan will blame the airline for treating them less well than other travelers.

Both groups agree that a market study should be conducted to learn more about consumer reactions to the plan. They are interested in the reactions of both the business traveler – their major customer – and the non-business traveler on a budget. With more information they will be better able to make a decision to install or drop the proposed plan.

Aviator's Sales Promotion Vice President has asked Hector to design a survey to find out whether the new plan will increase or hurt business.

Hector plans to construct a ten-question multiple-choice questionnaire. It will be distributed by flight attendants on all flights next month to get the reactions of Aviator passengers. It will also be distributed to everyone who enters the Aviator terminals in two different cities on the assumption that many of these people who deliver or pick up passengers might use the airlines themselves.

In this exercise you will design the questionnaire for Hector

1. Begin by listing the kinds of people who will answer the questionnaire. For example, people who already use the airline and people who don't may have different preferences. Aviator management will be most concerned about the opinions of their present customers. Also, people who fly coach and people who fly first class might have different attitudes. The business traveler and the non-business traveler may differ. Age, sex and income level might all make a difference in how people feel about the plan. Therefore, you will have to know about the type of person answering the question. For example, you could ask: "Are you flying_____ first class or______coach on this flight?" Or you could code the questionnaire so that only those marked A would be distributed in first class, those marked Z would be distributed in coach.
2. Remember that Aviator is concerned about the preferences of people who would use the plan and also people who would not.
3. List the questions you would ask for each group of consumers. Limit yourself to ten questions per group.

ACTIVITY F. *Which Way Do We Pay?*

Instructions

In this Activity you will make a management decision which may affect your business as well as your employee relations. Read the case and try to answer the questions which follow from Francine's point of view.

Case Study – House of Francine

The House of Francine is a major distributor of fine women's apparel. The company was started by Francine Geoffries about twenty years ago. Francine had formerly been a fashion designer. The company buys apparel from five manufacturers and sells to retail stores all over the country. Business has been good. Francine presently has eight sales representatives in different locations across the country. Francine spends much of her time encouraging and helping sales representatives to do an effective job. However, recently she feels that some of the sales representatives have been "taking it easy" and not selling as much as they could.

Presently sales representatives are paid on a straight salary basis. Some customers have mentioned that the sales representatives only visit when the customer calls them to place an order. Francine believes that a change from straight salary to a straight commission plan will improve sales and customer satisfaction.

With a commission plan, sales reps would really earn their pay. They would get a percentage of each sale they made. They would thus be motivated to sell as much as they could and would earn in proportion to their success. This would be fair to each individual and fair to the company since people who produced more would be paid more.

Francine proposes that the commission rate (the percentage each rep would get paid for each sale) would be different for each of the company's fashion lines. The more profit the House of Francine earns on a product line, the higher the commission rate for the sales reps. Salespersons would therefore be encouraged to promote the products which the company profits most from. Specifically, for product lines A, B, and C, sales reps would receive 2% of their gross sales. For product line D, sales reps would receive 4%, and for product line E, they would receive 5% commission on gross sales.

What worries Francine is that the sales representatives may seriously oppose the change. With a straight salary, they know what their income is and know that they will get paid this amount no matter how much or how little they sell. Sometimes sales are simply beyond their control. If customers are not doing well, they simply can't buy as much, even from the best sales rep in the world.

With the commission plan, the sales rep cannot be certain of his/her income. The reps may also feel that the change means Francine has lost confidence in them. They may simply decide to seek other employment. That, of course, would hurt Francine's business since many of these sales reps have had long relationships with the customers. Francine feels, however, that the sales reps would earn more, even if they sold the same amount they do now, and that they'd probably push to sell more.

- If you were Francine, would you adopt the straight commission plan?
- What are its advantages and disadvantages?
- A sales rep calls in to say he's heard you are considering adopting a straight commission plan and he's not sure he likes the idea. What would you say to him? How would you explain the plan?
- You will have your monthly meeting with sales reps next week. If you adopt the commission plan, what will you say? If you don't, what will you say?
- Explain the commission plan to an applicant for the position of sales rep.
- How is this explanation different from what you say to present reps?

ACTIVITY G. *Eyewitness News*

Instructions

In previous activities you have gained experience in considering some of the decisions made by marketing and distribution employees. In this activity you should choose a marketing and distribution occupation that is of interest to you (refer back to the cluster diagram). To learn more about the tasks, responsibilities, rewards and drawbacks of an occupation that interests you, you will talk to someone actively working in it. With the assistance of your teacher, try to arrange a visit to an employee in this occupation at his/her place of work. Sample interview questions are attached. Use these questions as a guide to learning more about it first-hand.

- If you do the interview in a group, assign one person as spokesperson
- Explain to worker that this interview is part of a class assignment.
- Encourage worker to answer all questions.
- At close of interview, encourage worker to give additional information about the job.
- Be certain to thank worker for his/her time and cooperation.

INTERVIEW GUIDE

1. What is the title of your occupation? ____________________

2. How long have you been in this position? ____________________

3. What kinds of jobs did you have before taking this one? ____________________

4. Are you involved in the supervision of other employees? ____________________

   If so, how many? ____________________

5. What are your responsibilities in your present job? ____________________

6. What kind of equipment, if any, do you use on your job? ____________________

7. What kinds of decisions do you have to make in your job?

8. What part of your job do you like best? ____________________

9. What part of your job do you like least?

10. What hours do you work every week? ____________________

11. How did you find this job? ____________________

12. What made you decide to take this job?

13. What specific education/training or experience was required for this job?

CONTINUED ON NEXT PAGE

14. Do you plan to stay in the same type of work if you leave this job? ____________________

Yes ______ No ______

Reasons: ____

____

____

15. How can you advance in this field? ________________________________

____

____

16. Would you advise young people to consider it as satisfying work? ________________

____

____

____

____

UNIT 13. COMMUNITY EXPLORATION PROJECTS

Student Materials

OVERVIEW

ACTIVITIES	MATERIALS
A. *It's That Time of Year* Plan and put up displays.	
B. *Comparison Shopping* Compare pricing strategies in three marketing and distribution industries.	Sample Form for Comparison Shopping
C. *Conducting a Survey* Get experience in marketing research, interview techniques, designing interview forms, and analyzing data.	Sample Interview Instrument
D. *Starting a Business* Plan and implement a plan for starting a school-based business.	Instructions
E. *Distributive Education Clubs of America* Learn about D.E.C.A.	Information Sheet

ACTIVITY B. *Comparison Shopping*

Instructions

After your group has decided on a list of items, use this form to record the prices of each item in various stores.

Sample Form for Comparison Shopping			
Name of Shopper:________________________________			
Store:	**1.**	**2.**	**3.**
Date Visited:			
Items	Prices	Prices	Prices

ACTIVITY C. *Conducting A Survey*

Instructions

Use this sample form as a guide in developing your own survey form.

Sample Interview Instrument
(for Topic # 1)

1. Name: ____

2. Age Group: ____Under 18 ____18-24 ____ 25-30 ____ 31-35____ 35-45____over 45

3. Have you ever rented a car? _____Yes _____ No *(If No, skip to question 8)*

4. How often (approximately) have you rented a car within the last year?

____ Once only ____ Once a week ____ Once a month

5. For what purpose have you rented a car?

____ Business ____ Personal ____ Both

6. What car rental agencies have you used?

____ Avis ____ National

____ Hertz ____ Other

7. Why did you choose the agency?

____ convenience ____ credit card

____ always use same one ____ advertisements

____ cost ____ other

8. Have you ever heard the slogan "We're Number One"?

____ Yes ____ No

9. From what source(s) have you heard this slogan?

____ T.V. ____ Newspaper

____ Radio ____ Other

____ Magazine

10. With what auto rental agency do you associate this slogan?

____ Avis ____ National

____ Hertz ____ Other

ACTIVITY D. *Starting A Business**

Instructions

During this activity you and your classmates will learn to operate your own business. Use this checklist to assist you in the planning of your venture.

____ 1. Investigate the various business opportunities available. For example, there may be an opportunity to sell food at sports events.

____ 2. Decide upon the type of business your class will operate.

____ 3. Decide what will be done with the profits, if any.

____ 4. Obtain the necessary permission from the school administration.

To do this, you should be prepared to give a presentation on what you intend to do – e.g., the product or service you plan to offer, the money needed, the students involved, the hours open, and so forth.

____ 5. Decide where the business would be located (it might be located in the school setting or outside the school setting such as in a church).

____ 6. Identify the merchandise and equipment necessary to operate the business. (For example, if you were to operate a candy store, you would need to purchase candy.)

____ 7. Identify suppliers for the necessary merchandise and equipment.

____ 8. Obtain cost information for merchandise, supplies and equipment.

____ 9. Identify the capital (money) needed to operate the business. For example, you would need money to purchase the candy.

____10. Determine the hours for the business (for example, the business might be opened from 3 p.m. to 5 p.m. after school, and/or on Saturdays).

____11. Identify persons (other than students) needed to assist you in planning and operating the business.

____12. Obtain the necessary capital or credit.

____13. Order the necessary supplies and equipment.

____14. Prepare advertising for the new business.

____15. Obtain a cash register or decide on an appropriate way of keeping track of sales.

____16. Identify the tasks which must be performed to operate the business.

____17. Identify the number of staff needed to perform these tasks: the total number, and the number needed each day of operation.

____18. Select students to perform each task.

____19. Develop an organizational plan.

____20. Develop a schedule for when people will work at the business.

____21. Keep daily record of:

- sales
- expenses
- deposits

____22. Plan for closing the business down.

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*Consult the Learn and Earn Project, Pepsi-Cola Company, Purchase, N.Y. 10577.

ACTIVITY E. *Distributive Education Clubs of America*

STUDENT-DIRECTED EXPERIENCES: DECA AND ITS ACTIVITIES

Youth organizations have proven to be extremely successful vehicles for learning business skills. The youth organization associated with the field of marketing and distribution is DECA, the Distributive Education Clubs of America. For students enrolled in the Distributive Education curriculum, DECA is an integral part of the instructional program. Its program of youth activities includes awards and scholarships, career development conferences, leadership training and educational projects.

Background of DECA

DECA is a non-profit, school-centered, self-supporting organization which is designed to develop future leaders for marketing and distribution. DECA is organized on the local, state, and national levels. At the local level, Distributive Education students form a Chapter of DECA and elect their own student officers. Nearly all Chapters are self-supporting with members paying local, state and national dues. The Distributive Education teacher-coordinator serves as the Chapter Advisor.

All Chapters within a state are chartered by and comprise a State Association of DECA. Each State Association elects student officers from its membership. National DECA is composed of State Associations. Student delegates elected or appointed by each state elect National Officers.

National DECA is made up of five divisions. The three student divisions are High School, Junior Collegiate and Collegiate. DECA's two adult divisions are an Alumni Division, composed of former Distributive Education students at all levels, and a Professional Division, composed of teacher-coordinators, teacher-educators, Distributive Education Supervisors and administrators, supporting businesspersons and interested parents.

The competitive events program of DECA, an outgrowth of the instructional program, provides learning experiences as well as awards and recognition. In many of these events students work with businesspersons in preparation for competition. Examples of the current competitive events for the High School Division are:

- **Public Speaking**, which is offered to promote the development of one's ability to arrange, organize and present information relative to distribution in an effective manner.
- **Area of Distribution Manual**, which is designed to give experience in research, selection and organization of information on an area of phase of distribution (e.g., credit, advertising, fashion).
- **Advertising**, which is offered to develop ability and skill in writing copy and planning layout for a newspaper ad.
- **Sales Demonstration**, which is designed to enable the student to use his knowledge of good selling by performing a sales demonstration.

One of the major activities of DECA is the Merits Awards Program (MAP). The program, a competency-based approach to career exploration and preparation in marketing and distribution, is based on individual student achievement accompanied with an awards program for student recognition. MAP activities correspond to the competencies needed in distributive employment and progress in complexity from Bronze level to Silver level to Gold level. Within each grouping the student must demonstrate her/his knowledge of economic understanding, product and/or service knowledge, communications, human and public relations, and marketing.

In addition to the competitive events, most DECA Chapters conduct a variety of sales project activities. These activities include: operation of the school bookstore, candy and bake sales, car washes, selling of merchandise with the school seal. Well-planned and implemented sales project activities provide students with experience in selling, buying, handling cash and other business-related responsibilities. The profits from these activities are used to defray the costs of travel expenses to state and national conferences, social activities and other Chapter activities, and provide funds for the betterment of the school and the community.

UNIT 14: HOW TO START ONE'S OWN BUSINESS

Student Materials

OVERVIEW

ACTIVITIES	MATERIALS
A. *Review of Entrepreneurship*	
Re-examine some of the advantages and disadvantages of entrepreneurship in class discussion.	
B. *Identifying the Market*	
I. *Cora's Dress Shop*	
Identify generic characteristics of a market in a case study.	Case Study
II. *See the Light.*	
Analyze degree to which an entrepreneur appropriately investigated the market in a case study.	Case Study
C. *Financing a Business*	
Identify typical expenses and capital requirements for financing a business, and funding sources for doing so.	Information Sheet; Interview Form
D. *Making Financial Projections*	
Make financial projections.	Case Studies
E. *Organizing a Business*	
I. *Organization Chart.*	
Match staff with functions	Instructions; Description of company, plus Organizational Chart. Job Descriptions.
II. *Organizing for Work.*	
Identify tasks and functions and develop a plan in case study exercise.	Instructions and Case Study

F. *Promoting a Business*

Develop your own advertising campaign, deciding on media, audience, etc.	Instructions and Case Study.

G. *Business Planning in Review: Will Joe Make It?*

Analyze a fictitious new business to assess its quality of planning.	Instructions; List of questions and Community Description.

ACTIVITY B: *Identifying A Market*

I. Cora's Dress Shop

Instructions

Read the following case and list the types of information which Ms. Coate needs to define a market for a product or service.

Ms. C.A. Coate is in the initial stages of planning a business. As a matter of fact, the name of the store is all the planning she has done. Ms. Coate, the potential owner of the store, is uncertain how to proceed so she is seeking advice from a businessman well established in the apparel business. Ms. Coate knows that she wants to sell only dresses in the price range of $75-$150.

Mr. Mathison, the businessman from whom she is seeking advice, suggests that she find out more about the following items. First, she should know who her consumers (customers) will be. Next she should be able to estimate the income of her consumers. In addition, she should identify the age of her consumers. Another important factor is where the consumers are located and where the consumers tend to shop. Finally, the taste of the consumers has to be considered in purchasing goods. Ms. Coate investigated each of these areas. She found that her consumers would be women between the ages of 25 and 50 with incomes from 10 to 30 thousand dollars. She found that these consumers tend to live in suburban areas and shop in outlying malls. Given the age range, Ms. Coate decided to have a wide range of differently styled dresses.

Many friends of Ms. Coate have reminded her that a large percentage of small retail stores die in the first few years of operation. These friends say one reason for this high mortality (death) rate is that the business never determined *to whom* they were targeting their product. Ms. C.A. Coate wants to avoid the failure of **Cora's Dress Shop**. However, she is not sure whether she has, in fact, defined her market or what additional information she needs to know about her market.

1. Where should Ms. C.A. Coate locate her store?
2. What kinds of dresses should she buy?
3. What kind of decor might please her consumers?
4. What kind of advertising should she do?

As a guide to answering these questions, ask yourself the question:

> "What would happen if Ms. Coate directed her sales efforts to high school girls between the ages of 15-18?"

II. See the Light

Instructions

Using your list of issues to be considered in defining a market from the previous case, examine Mr. DoBottom's case to determine what his mistakes were.

Mr. DoBottom has fallen "in love" with a magnetic lamp – that is, a light that can be hung from any metal piece. Mr. DoBottom was so delighted with this invention that he decided to start a business which specialized in these fixtures. This business, **See the Light**, sold no other product except the magnetic lamp.

Mr. DoBottom had been saving money over a long period of time. Initially, he had planned to use this money in his old age. However, his excitement over the possibility of significantly increasing his earnings made him decide to use his savings to start his business. Mr. DoBottom selected a store on Main Street (a high rent district) for his site. He felt the "foot traffic" on such a main thoroughfare would bring persons into the store who otherwise might not know about the lamp.

In the store, Mr. DoBottom had an extensive display of the many designs for magnetic lamps. He had established credit arrangements for his customers, and a lay-away plan. The lamps cost in the range of $150-$300.

When he first opened the store, Mr. DoBottom had about twenty people a day who came in to browse. Of these, one or two would buy a lamp. The majority of the browsers were young couples in their early twenties. After a few months, the number of browsers had declined and with it the number of sales. He had about two browsers a day and was lucky to get a sale. During the holiday season, the number picked up again to about twenty browsers with one or two sales a day.

After **See the Light** had been in business for one year, it died.

Where could Mr. DoBottom have gone wrong?

ACTIVITY C. *Financing A Business*

Instructions

Read the Information Sheet, **What Does It Cost To Start Your Own Business?** It shows the variety of things that cost money in starting a business. The information will be useful to you when you interview people who lend money to business owners.

WHAT DOES IT COST TO START YOUR OWN BUSINESS?

Once the entrepreneur has defined the nature of his/her product, and defined the consumer for it, he/she must figure out how much money it will take to get started.

Financing a business requires: 1) identifying the costs and 2) finding the means of getting the money to cover the expenses.

Let's look at what some of the typical expenses of any business might be. First, you need to buy the product(s) (this is called inventory) you want to sell. For example, if you are going to open a tennis store, you will need a supply of tennis racquets, tennis balls, tennis clothes, and so forth. You will have to determine *how much* of each of these items you will need over a certain period of time (e.g., each month).

Also, you will need a place to operate your business. You can buy or rent. Either way, space must be paid for.

Another expense is equipment and furniture. For example, if you are going to open the tennis store, you need shelves, counters, a cash register, perhaps equipment for stringing a racquet.

Another typical expense is the cost of personnel (workers). You may need sales people in your tennis store, and you will need money to pay for their salaries. You must also consider the costs of a lawyer to help you organize the business and to advise you. An accountant who keeps records must be paid also. Insurance, taxes, telephone, electricity are all expenses of running a business.

The nature and extent of expenses varies with the nature of the business. For example, to open a dry cleaning operation will require a great deal more equipment than to open a pet shop. On the other hand, a pet shop needs a large inventory (animals, pet food, and so forth) and the dry cleaning operation does not. The costs of space vary, too. In some locations, rent is very high. For example, a furniture store located downtown in the shopping district will cost more than a neighborhood dry cleaner located in a residential neighborhood near the customer's home.

Let's examine briefly what some of the typical costs are for start-up of these types of marketing and distribution businesses. According to the U.S. Department of Commerce, it costs between $15,000 and $30,000 to open a pet shop. The typical start-up costs associated with a pet shop are equipment and fixtures, inventory, and money to pay staff, rent, and so forth.

A dry cleaning operation costs about the same but for different kinds of items.

A furniture store costs much more. Money is needed for inventory, supplies, equipment and fixtures, decorating, and so forth. The kind of product is expensive – obviously a chair costs more than a goldfish. To start a furniture store might take about $75,000.

Some businesses require very little money to start. Let's suppose that you want to be a self-employed advertising layout person. That is, instead of working for an advertising agency, you sell your services and skills to any agency, or company, that has need for them. This is often called free-lance work. Capital you would need would be much less than for some of the other businesses. You might work out of your home, or rent a room in a building (you would not need much space to do your work). You would have to purchase some equipment and supplies, but these are rather inexpensive. You would not need any staff. Your sales promotion cost would be your time – you would have to spend time visiting companies to sell them your skills and services. Another free-lance opportunity is putting in window displays for small retailers.

The important thing to remember is that there are many opportunities for entrepreneurship in the field of marketing and distribution. Financing is an important consideration in pursuing this as a career option. Starting a business with enough money is important to making it go.

INTERVIEW WITH LENDERS

Instructions

- You and your group have been assigned to interview representatives from one of three major sources of money for new businesses – banks, loan companies, or Small Business Administration loan officers.
- You should interview the loan officers at their offices.
- You should explain that you are asking these questions as part of a class assignment.
- Try to be fast and efficient in conducting the interview.
- Be certain to thank the loan officer for her/his time.

INTERVIEW SHEET

Lenders to Entrepreneurs

Sources: ____________________

1. Do you make many loans to new businesses?
2. Do you loan more money to established businesses?
3. Do you have a limit (quota) on the amount of money you can or will loan a new business?
4. How long does it take the average client to receive approval for a loan?

THE FOLLOWING QUESTIONS REFER TO THE TYPE OF CHARACTERISTICS AND INFORMATION YOU LOOK FOR FROM A NEW BUSINESS.

5. What do you want to know about the nature of the business (e.g. product to be sold, etc.)? ____________________
6. Do you ask about money the businessperson already has?
7. Do you ask about the owner's age? ____________________
8. Do you ask about the owner's personal life (e.g. marital status, children, etc.)?
9. Do you ask about her/his health?
10. What do you want to know about financial projections?
11. What else do you need to know about the business or the owner?

ACTIVITY D. *Making Financial Projections*

Instructions

Read the Information Sheet on *The Terms of the Game.* Then, do the problems presented in the case studies.

THE TERMS OF THE GAME

Cost of Goods Sold

In every business some items must be purchased from another business in order to operate. In a record store, records must be purchased from a supplier of records. In a beauty shop, shampoo and other items must be purchased from suppliers. In a restaurant, food must be purchased. Money spent on obtaining the goods and materials which make up the finished product or service of the business is called COST OF GOODS SOLD.

Discussion Questions

1. What would the Cost of Goods Sold include for a yarn store?
2. Would the waiter in a restaurant be part of Cost of Goods Sold?
3. List three possible items in Cost of Goods Sold for a hardware store.

Expenses

Other monies are spent in operating a business in addition to the Cost of Goods Sold. For example, if you own a restaurant, you must pay the cook who prepares the food. If you own a record store, you will pay the sales clerks. If you own a beauty shop, you will pay the hairdressers. All businesses pay for theft and fire insurance, and most pay to advertise. All of these expenditures are called the EXPENSES of operating the business. Expenses include such items as:

Rent
Salaries for employees
Owner's salary
Telephones
Insurance
Deliveries
Advertising and Promotion
Equipment

Discussion Questions

1. What might be some of the Expenses of operating a Real Estate Office?
2. Is a typewriter in an Insurance office part of Cost of Goods Sold or an Expense? Why?

Sales

In addition to paying out money, the business receives money. The record store receives money for the records it sells. The beauty shop receives money when a customer has her hair styled. The restaurant receives money when customers eat there. These receipts (money taken in) are referred to as the SALES.

Discussion Question

Where do the Sales in an advertising agency come from?

Profit

The businessperson uses these concepts to determine what her/his profit is or might be. **The difference between SALES and COST OF GOODS SOLD equals GROSS PROFIT**. Gross Profit is the earnings of the business before the expenses of running the business have been subtracted. When expenses are **subtracted** from gross profit, the result is NET PROFIT. **GROSS PROFIT minus EXPENSES equals NET PROFIT**. Net profit represents the real earnings of the company.

Discussion Questions

1. What do you see as the advantage(s) of a business person determining Gross Profit separate from Net Profit?
2. If the Expenses of the company totaled more than the Gross Profit, would the company have a Net Profit?

Business people use equations to relate these items. The symbols in the equations are:

S – Sales
CGS – Cost of Goods Sold
E – Expenses
NP – Net Profit
GP – Gross Profit

The equations which are used to express how one derives Net and Gross Profit are:

Sales – Cost of Goods Sold – Expenses = Net Profit

Sales – Cost of Goods Sold = Gross Profit

Net Profit = Sales – (Cost of Goods Sold + Expenses)

Break-even

Although most businesses hope to earn some profit, the least the business hopes to do is to break-even. That is, the business may not earn money, but neither does it lose money. When the Cost of Goods Sold and Expenses equal Sales (CGS + E = S), the business breaks-even. That is, there is no profit and no loss.

Discussion Questions

1. Why would a business be concerned with breaking-even?
2. Explain why Cost of Goods Sold + Expenses = Sales is the same as breaking-even?

CASE STUDIES

Case #1

1. The record company earned $50 in sales. It sold 100 records at $.50 a record.
2. The Cost of Goods Sold for each record was $.25. Therefore, the Cost of Goods Sold for 100 records is $25. (100 records x .25 – $25)
3. The expense for the records (publicity, etc.) totals $10.00.
   - a) What is the Gross Profit?

     (Gross Profit = Sales – Cost of Goods Sold)
   - b) What is the Net Profit?

     (Net Profit = Gross Profit – Expenses)

Case #2

1. The taco stand sold 500 tacos at $.60 a taco.
2. The food for the taco totals $.20 a taco.
   - a. What is the Gross Profit?

     (Gross Profit = Sales – Cost of Goods Sold)

Case #3

1. Let's assume you sell necklaces at a bazaar for $1.00 a necklace.
2. The beads for the necklaces each cost 1¢.
3. The chain for the necklaces each cost $.50.
4. Each necklace consists of 1 chain and 10 beads.
5. You need 2 people to sell the necklaces. Each person is paid $3.00.
6. Expenses for advertising, booth decorations, etc. total $5.00.
   - a. What is the Cost of Goods Sold?
   - b. What are the Expenses?
   - c. If you sell 100 necklaces, what is the Net Profit?

     (Net Profit = Sales – Cost of Goods Sold – Expenses)
   - d. If you sell 125 necklaces, what is the Net Profit?

Pricing

As can be seen in the previous exercises, the Net Profit earned by a business varies with the number of Sales made, and the costs associated with making these Sales.

Another important factor of Sales (in addition to quantity sold) is the price of the product or service. If the price is lowered, the quantity sold may increase. On the other hand, if the price is raised, the quantity may decrease. However, a decrease in quantity at a higher price may in fact produce a larger Net Profit. Let's go through the following example.

Case #4

Let's return to the necklace business discussed in Case #3.

1. Let's assume you sell each necklace for $1.50 instead of $1.00.
2. All other costs remain the same.
3. With the higher sales price, however, you sell only 70 necklaces instead of 100.
   a. What is your Gross Profit?

      (Gross Profit = Sales – Cost of Goods Sold)

   b. What is your Net Profit?

      (Net Profit = Gross Profit – Expenses)

As you can see, although you sell 30 less necklaces you earn more money by raising the price.

These are the type of considerations and issues which must be worked out by an entrepreneur in making her/his financial projections.

Case #5

It was illustrated in the previous case that profit is affected most by two things: volume (or quantity of goods sold) and price. Reducing the Cost of Goods Sold or the Expenses are other means of increasing profit. However, the businessperson must first analyze costs and probable sales at different prices before finally establishing a price.

1. You are still in the necklace business. The Cost of Goods Sold ($.01/bead and $.50/chain = $.60 necklace) and the Expenses ($11) for operating the business are fixed (they cannot be changed).
2. When you purchase the beads, you must buy them in quantities of 100 beads.
3. When you purchase the chains, you must buy them in quantities of 10 chains.

What volume of necklaces would you have to sell at what price in order to break-even?

ACTIVITY E. *Organizing A Business*

I. Organization Chart

Instructions

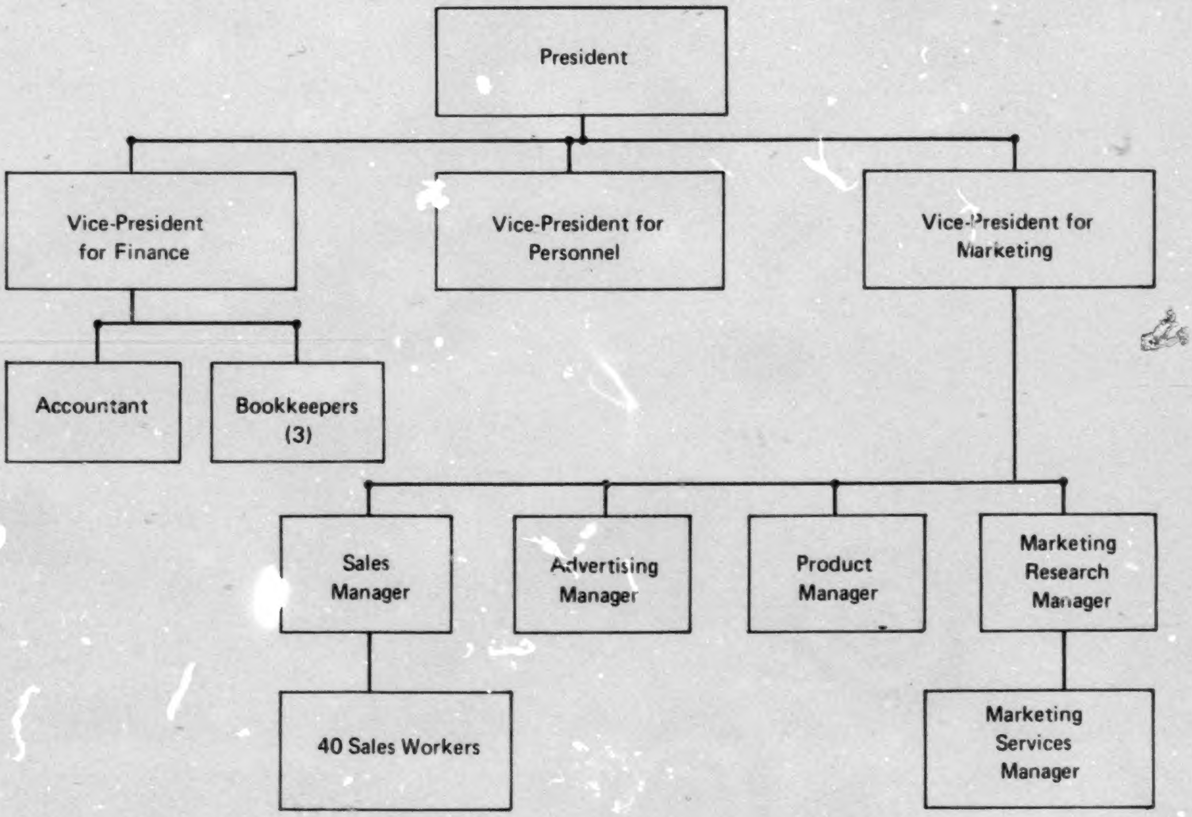
In this exercise you will be analyzing an existing business and determining what tasks the individuals named on the business's organization chart are responsible for. You will be able to see from this the many different tasks and responsibilities involved in the business described.

1. Read the description of Smith, Jameson and Jones, Inc. and study the organizational chart.
2. Working in teams, match the individuals on the chart with the correct descriptions of their tasks and responsibilities.
3. When you have finished, each team will discuss its answers with the class.

DESCRIPTION OF SMITH, JAMESON AND JONES, INC.

Smith, Jameson and Jones, Inc. is a wholesaler of small electric appliances. It has 100 employees, forty of whom form the sales force. The reason for such a large sales force is that its products are sold nationally.

ORGANIZATION CHART


President
Vice-President for Finance
Vice-President for Personnel
Vice-President for Marketing
Accountant
Bookkeepers (3)
Sales Manager
Advertising Manager
Product Manager
Marketing Research Manager
40 Sales Workers
Marketing Services Manager

JOB DESCRIPTIONS

1. In charge of the overall operation of the business, including planning, policy making and hiring of key executives (managers).

2. Responsible for creating advertising and sales promotion programs and for developing materials necessary for these programs.

3. Responsible for selecting, hiring, training, supervising, and controlling the activities of the salespersons. Must have experience in selling, so that he can understand the problems faced by his salespersons. Assists the marketing manager by providing him with recommendations on the following: sales policies, sales goals, selling prices, and channels of distribution.

4. Reports to the Vice-President for Finance. Keeps accounts of cash disbursements (out) and receipts (cash in).

5. Responsible for the various services necessary in filling customers' orders. This includes order processing, customer services, shipping, warehousing, inventory control, and upkeep of sales records and reports.

6. Responsible for studying the markets for the company's products to determine customer needs. Makes his information available to the marketing manager for use in planning, purchasing, and selling the company's products.

7. Responsible for the financial operation of the business including financial planning and accounting.

8. Responsible for the entire marketing organization of the company. In charge of the marketing department. Reports to the chief executive.

9. In charge of hiring, supervising and firing personnel.

10. Maintain the "books" (financial records) for the company with the assistance of the accountant.

11. Responsible for the sales and profits of the product assigned to him. His job is to study the market for his products, plan the variety that should be included in his product line, select packaging, and recommend pricing, distribution, and sales and advertising programs for his product.

II. Organizing For Work

Instructions

Based upon the description of this car wash operation, you and your team members are to perform two tasks.

1. Identify the tasks and functions required to operate this car wash.
2. Develop an organizational plan for accomplishing these tasks.

Your organizational plan should indicate *who on your team will be responsible for each task.*

Be prepared to present your organizational plan to the rest of the class.

DESCRIPTION OF CAR WASH OPERATION

Wash Me car wash is located next to a gasoline service station in a quiet section of the city. This operation offers several services to its customers. Its services include:

- cleaning the outside of cars
- cleaning the inside of cars
- waxing cars (upon customer request)

The aspect of **Wash Me** which is unique is that all these services are done by hand – that is, there are no "cleaning" and "waxing" machines. Because of its uniqueness, **Wash Me** services approximately five cars per day.

ACTIVITY F. *Promoting A Business*

Instructions

This exercise illustrates the process of developing a promotion campaign. You will have the opportunity to plan a campaign with members of a group. Decide what you think will most effectively meet the needs of the business described in the case study attached.

1. Read the attached Case Study.
2. Your task is to develop an advertising campaign.
3. Your campaign can take any of several forms. It may be:
    a. a skit – something you might see on television or hear over the radio,
    b. a visual presentation – such as those used in magazines and newspapers,
    c. displays or signs – such as those used on billboards, or signs in front of a store,
    d. or any other form you and your group agree upon.

    You will not have time to develop more than one type of campaign so do NOT try to.
4. You should first decide the following:
    a. a name for the store,
    b. the appropriate form (e.g., television versus magazine) for reaching the intended consumer and the reasons for selecting that particular one,
    c. the type of information this consumer would need to know about your product,
    d. how the product can satisfy the consumer's needs.
5. Once you have agreed upon the above items, you should develop your campaign.
6. Each group will present their advertising campaign to the class. This presentation should include a presentation of their campaign, and the group's answers to the issues raised in question #5.

CASE STUDY

Chris Williams is planning to open a small clothing store specializing in jeans. She is planning to stock jeans in all sizes, except children's, for both men and women. She wishes particularly to cater to the tastes of young people and has purchased faded jeans, patched jeans, flares and others that are popular with them. She will have all major name-brands in stock plus other less well-known brands.

Chris's store will be located in the main business district of a suburban town. There are several clothing stores in town already: a department store which has a Mod Department for young people and carries some jeans among its other items; an Army-Navy store which carries discount-priced blue jeans and overalls; two dress stores; and a men's and boy's clothing store which carries both casual and dresswear.

Chris has not yet named her new store.

ACTIVITY G. *Business Planning In Review: Will Joe Make It?*

Instructions

Do you think Joe's restaurant will be successful? Read through the community description and answer the following questions, using the information given in the community description and the knowledge you have learned throughout this unit. When you have finished, you will discuss your answers with the class.

1. Describe the kinds of customer that Joe might attract to his restaurant.
2. Do you think that people living in Everest or near the campus will patronize Joe's restaurant?
3. What kind of competition does Joe have?
4. Do you think that Joe did a good planning job in identifying his market and the nature of the competition?
5. Do you think that Joe will experience any particularly slow times, i.e., times when he doesn't have many customers?
6. Is the location Joe has chosen a good one?
7. What kind of staff does Joe need? What qualifications should they have?
8. Are there any licensing requirements for Joe's restaurant?
9. What recommendations would you give to Joe about promotion and advertising for his new restaurant?
10. What other resources could Joe have investigated to finance his restaurant?

COMMUNITY DESCRIPTION

River City is a community of 40,000 persons in your state. Most of the people in River City are connected with River City College, which is located on a hill in the center of town. There are 18,000 students, 1500 faculty and 750 staff members at the college. Many of the other people in town work in businesses that provide products or services to the college or its personnel, such as stationery stores, book stores, clothing stores, etc. The town has the usual complement of banks, gasoline stations, insurance companies, hardware stores, barber shops, lawyers, doctors and dentists, restaurants, and the like.

Although River City is 25 miles from the nearest large city, about 200 men and women commute from River City to work in the city every day. Most of these people work in financial institutions and businesses.

River City is in a beautiful location. There are mountains nearby to the west of town which attract tourists for hiking, skiing, and sightseeing. Many of River City's residents enjoy the recreation facilities there as well. There are several country inns on the way to the mountains where people stop to eat or to stay overnight.

There is no single residential area in River City. Students live in domitories on campus or in apartments nearby. Faculty and staff live either within walking distance of the campus or else in large old houses along the river to the east of town, in a section known as Everest. Many businesspersons and professional people also live in Everest. Other people live in places scattered throughout the city.

People who live in River City generally like to do all their shopping there, although sometimes faculty members and others will drive to the city for an evening out.

There are several shopping areas in River City. The main business district is located along Main Street which is about six blocks long. Most of these businesses close at 5:00 or 6:00 p.m., although there are three restaurants which stay open late to accommodate the movie crowd. There are also two fairly new shopping malls, located to the north and west of River City, both of which are attracting some business away from downtown. Most of their business comes from people who live on the outskirts of town, although since they both have large discount-type stores and supermarkets, they also attract students and others from all areas of town. The stores in these two malls stay open late, usually until 9:00 p.m. There is a family-style restaurant in each mall plus several fast-food hamburger places.

Until now, people who wish to eat dinner out have either gone to a fast-food place, to a downtown restaurant or a restaurant in the mall, to the Faculty Club on campus (for faculty and staff and their guests only), or to the city.

Description of Joe

Joe Peters has decided to fulfill a lifelong dream and open a fancy restaurant. He is fortunate in that he does not have to worry about financing, since he has some personal savings and a loan from a local bank, to supplement his savings. He is going to open his new restaurant to the west of the city adjacent to the shopping mall. The restaurant will be in an old farmhouse that he has remodeled for the purpose. He retained the wooden ceiling beams and wide floorboards in the building and has added furnishings, such as white linen tablecloths, expensive china and placesettings, candles, a lengthy wine list, which he hopes will attract faculty members, business people and others. Joe's restaurant is unlike any other in River City.

UNIT 15: THE HUNT: JOB HUNTING, FINDING, HOLDING

Student Materials

OVERVIEW

ACTIVITIES	MATERIALS
A. *Locating Job Openings*	
Identify job openings and the sources of this information for your three favorite occupations as an out-of-class activity.	Relative Advantages/Disadvantages of Resources chart; *Locating Job Openings* Instructions and Form
B. *Arranging for the Job Interview*	
Role-play arranging for job interview.	Instructions. Two sets of job seeker and employer profiles.
C. *Preparing for the Interview*	
I. *Employer Needs to Know.*	
By interviewing employers, identify what the employer needs to know about the job seeker.	Employer Interview Form.
II. *Writing Yourself Up.*	
Learn to sell yourself by preparing a resume and completing a job application.	Two sample resumes and one sample job application. Instructions, Profile on Jay Strong, and Incomplete Job Application.
III. *Applicant Needs to Know.*	
In small group discussion, learn what the applicant needs to know about the employer.	Instructions.
D. *The Interview*	
I. *Employer and Interviewee Responsibilities.*	
Identify the issues concerning the interview responsibilities of the employer and applicant by analyzing a sample dialogue and profiles.	Instructions Dialogue and Profiles.
II. *The Interview.*	
Practice your interviewing skills in role plays.	Instructions. Two Employer Profiles and Two Applicant Profiles.

E. *Follow-Up on Employment Contacts*

Discuss importance of follow-up.

F. *Holding a Job*

Analyze mini-cases to determine reasons why people become dissatisfied with jobs.	Chart on *Why People Leave* – and Case Studies.

ADVANTAGES AND DISADVANTAGES OF JOB SOURCES

		APPLICANT		EMPLOYER	
		Advantages	Disadvantages	Advantages	Disadvantages
1.	U.S. Training and Employment Service	– free – counseling available – aptitude testing available – information available on training programs	– poor placement record – tends to have entry level and minimal skill level jobs only	– free – some screening of applicants	– lots of applicants, many not suited for the job
2.	Newspaper want ads	– cheap – readily accessible – always available	– too little information	– wide circulation – cheaper than an employment agency	– costs money but cheaper than agency – no method for screening applicants
3.	Private Employment (Placement) Agencies	– counseling available – degrees of commitment to *your* case – aptitude testing available	– there might be a fee – widely varying placement record	– screening of applicants	– there might be a fee
4.	Employers: Personnel Directors	– direct link to employer (no middle-man) – might find out about job opening which hasn't been publicized yet – this service is free	– diffuse (not centralized)	– direct link to applicant (no middle-man) – no fee	– unsystematic – dependent on whoever appears
5.	Friends and Relatives	– free	–don't necessarily know your skills, interest, and abilities – likely only to know about a limited number of jobs; haphazard way of looking for a job	– free	– haphazard way of looking for employees – may feel obligated to interview an unqualified candidate for sake of friendship

Instructions

In this exericse, you will get some practice in identifying job openings using the resources we have discussed in class.

1. List, in order of preference, the three marketing and distribution jobs which interest you most.

1. ____________________

2. ____________________

3. ____________________

2. For each job, find out what job openings are available. Use the want ads in the newspaper, the Employment Service, a private employment agency, or friends and relatives. For each job opening you locate, write the name of the business in the left column and the source of information in the right column.

a. Job title ____________________

Available openings:

NAME OF BUSINESS	SOURCE OF INFORMATION

b. Job title ____________________

Available openings:

NAME OF BUSINESS	SOURCE OF INFORMATION

c. Job title ____________________

Available openings:

NAME OF BUSINESS	SOURCE OF INFORMATION

3. Identify possible future job openings for each of the jobs you have chosen. You can get this information from Personnel Directors, from employers and, perhaps from friends and relatives.

a. Job title ____________________

Possible future openings

NAME OF BUSINESS	SOURCE OF INFORMATION

b. Job title ____________________

Possible future openings

NAME OF BUSINESS	SOURCE OF INFORMATION

c. Job title ______________________________

Possible future openings

NAME OF BUSINESS	SOURCE OF INFORMATION

ACTIVITY B. *Arranging For The Job Interview*

Instructions

If you are using the Employment Service or an employment agency, an appointment for a job interview may be made for you. However, if you are job hunting by yourself, for example, if you're responding to a newspaper ad, you will probably make the arrangements for yourself. The following role-plays are intended to give you practice in arranging for a job interview with an employer by telephone.

1. You will work in assigned teams.
2. You and your team member should first decide who will play the employer and who will play the applicant.
3. You will switch roles in the second role-play.
4. You should not face one another while conducting the role-play. Either sit sideways or turn back-to-back. Remember this is a telephone conversation, not a face-to-face interview.
5. You are given more information than you may need in making the appointment. It is there in case you need it. Use your judgment in selecting relevant information.
6. Remember, this is only to arrange an appointment. It is not the formal interview.

ROLE PROFILES

Employer – 1

You are about to play the role of Terry Haskings, employer. You have just placed an advertisement in the newspaper:

ROUTE SALES

Immediate Opening for aggressive route salesperson to service our est. accounts. Route sales exp. a must. Call for appt., 10:30 – 3. Toy House Inc., 462-7676.

You are about to receive a phone call from a job applicant. Although you plan to reserve most of your questions for the interview itself, there are certain basic things you want to know beforehand to make sure the interview won't be a waste of time. You ask the applicant the following questions (and any others which you think are appropriate):

- Have you had any experience as a route salesperson?
- If so, whom did you work for?
- When can you start work?

If the applicant has worked as a route salesperson and can start work immediately, arrange a date and time for the interview.

Applicant – 2

You are about to play the role of Jo Baxter, clerk. You currently work for the Jones Shipping Co. as a shipping and receiving clerk. You are looking for a job because you are dissatisfied with the advancement opportunities at the Jones Shipping Company; the company is very small and there is not much room for advancement. You noticed an advertisement in the newspaper:

> **INSURANCE CLERK**
>
> For auto department of insurance agency located downtown, prefer someone with insurance experience, hours 9 to 5, salary open. Call Pat Reddington, 487-0484.

and decide to apply for the job, even though you have no experience in the insurance business. You did, however, major in business in high school and went to business school for two years following your graduation from high school. You have worked at Jones Shipping Co. for three years. Before that, you worked for two years as a clerk for Allen's Stationery Store. You look forward to the opportunity to get into a new business. Your only restriction is that you have to give two weeks' notice before you can leave your current job. This means that if you are hired, it will be two weeks before you can start work on the new job.

You are about to call Pat Reddington who placed the ad. The purpose of the call is to arrange for a job interview. You will then role-play the conversation. You will not necessarily have to use all the information about 'Jo Baxter' provided above. During the conversation, keep in mind the following points:

- Speak slowly and clearly.
- Identify yourself (i.e., give your name).
- State the reason for the call (to arrange for a job interview).
- Explain how you found out about the job (i.e., newspaper ad).
- Ask whether the job has been filled. If so, say goodbye and hang up. If not, continue.
- Ask for a convenient time to have the interview. Agree with Pat Reddington on a date and time. End the telephone conversation.

Applicant – 1

You are about to play the role of Chris Bailey, salesperson. You are looking for a job and happened to find an advertisement in the newspaper:

ROUTE SALES

Immediate Opening for aggressive route salesperson
to service our cst. accounts. Route sales exp. a must.
Call for appt., 10:30 – 3. Toy House Inc., 462-7676.

You have a high school diploma and several years' experience as a salesperson. You have decided to apply for the job. You worked for Hard Tack Hardware store as a salesperson for two years. You have also worked as a route salesperson for three years for the On-the-Road Cosmetics Company. You are currently unemployed and therefore can start work immediately once (and if) you are hired.

You are about to call the employer who placed the ad. The purpose of the conversation is to arrange for an interview. You will role-play the conversation. You will not necessarily have to use all the information about 'Chris Bailey' provided above. During the conversation, keep in mind the following points:

- Speak slowly and clearly.
- Identify yourself (i.e., give your name).
- State the reason for the call, i.e., to arrange for a job interview.
- Explain how you found out abut the job, i.e., newspaper ad.
- Ask whether the job has been filled. If so, say goodbye and hang up. If not, continue.
- Ask for a convenient time to have the interview. Agree with the employer on a date and time. End the telephone conversation.

Employer – 2

You are about to play the role of Pat Reddington, interviewer (employer's representative). You have just placed an advertisement in the newspaper:

> **INSURANCE CLERK**
>
> For auto department of insurance agency located downtown, prefer someone with insurance experience, hours 9 to 5, salary open. Call Pat Reddington, 487-0484.

You are about to receive a phone call from a job applicant. Although you plan to reserve most of your questions for the job interview itself, there are certain basic things you want to know beforehand to make sure the interview won't be a waste of time. You ask the applicant the following questions (and any others you think are appropriate):

- Have you had any experience as a clerk? If so, how long?
- Have you had any experience in insurance?
- Whom have you worked for?
- When can you start work?

If the applicant has worked for at least two years as a clerk (preferably an insurance clerk) and can start work within three weeks, arrange a date and time for the interview.

ACTIVITY C: *Preparing For The Interview*

I. Employer Needs to Know

Instructions

In this activity, you will interview various employers in your areas. The purpose of this interview is to find out what different employers require in terms of information from job applicants.

INTERVIEW FORM

1. In addition to the name and address of the job applicant, what other information do you request in order to decide whether or not to hire?

   ____ marital status
   ____ age
   ____ military status
   ____ work objective
   ____ salary objective
   ____ education (when, where, what studied)
   ____ work history (who worked for, dates, skills and responsibilities)
   ____ hobbies
   ____ languages
   ____ references
   ____ reliability
   ____ when available for work
   ____ other (specify)

2. How do you get this information? (e.g., Resume? Application Form? Interview?)

   ____
   ____
   ____
   ____

II. Writing Yourself Up

Instructions

Now that you have an idea of what the employer wants to know, the next question is how does he get this information? One way is through a document called the *resume*. A resume is a written summary of that part of an individual's life and work history which relates to employment. An individual usually prepares a resume when looking for a job. He/she typically either mails the resume before the job interview or brings it with him/her to the job interview. Another way the information is provided is the *job application* which is designed by the employer and which he gives to the job applicant to complete.

The purpose of this exercise is to give you practice both in preparing resumes and in completing job application forms.

1. Review the sample resumes and job application.
2. Read *The Life History of Jay Strong: An Autobiography*
3. Examine the blank Job Application Form.
4. In small groups, prepare a resume for Jay Strong, using the information in the *Life History*. You may refer to the sample resumes. Note that work experience is presented in chronological order with the most recent job first.
5. When you have finished writing the resume, your group should turn to the Application Form and complete it for Jay Strong, using the information in the Life History.

RESUME

Deborah Cahill
6 Chestnut Street
Peoria, Mass. 02222
617-292-1357

Job Objective: Management Position in the Retail Industry

Desired Salary: $8,000 – $13,000

Marital Status: single

Military Status: N/A (not applicable)

Date of Birth: January 2, 1948

Education:

AA, 1968, Johnson Junior College, major in business

High School Diploma, 1966, Beaver High School

Work Experience:

1973 – present	All-Foods Supermarket. General Manager in charge of overall store operations, hiring and supervising staff, ordering and supervising receipt of food supplies, responsible for record-keeping and accounting.
1970 – 1973	Have-Some Supermarket, Assistant Manager. Responsible for screening new applicants, checking orders and food receipts and supervising cashier-checkers.
1968 – 1969	Tradewinds Department Store, Floor Supervisor. Responsible for supervising sales personnel, checking cash register receipts and general bookkeeping.

Languages:

Spanish

References:

Bob Jones
All-Foods Supermarket
211 Main Street
Boston, Mass. 00001
617-285-6000

Janice Lee
Have-Some Supermarket
101 Center Street
Cambridge, Mass. 00002
617-343-3124

RESUME

Richard Widmark 115 James Street Westboro, New York 212-123-4567	Marital Status: married, 2 children Military Status: 8Z

Job Objective: Salesman, any product

Desired Salary: $10,000 – $12,000

Education:

High School Diploma, 1958, Smith High School

Work Experience:

1970 – present	Real Estate Broker. Rent, buy and sell property for clients on a commission basis. Accompany prospects to property sites, quote purchase price, and discuss condition of sale or terms of lease. Draw up real estate contracts, such as deeds, leases, and mortgages and negotiate loans on property.
1965 – 1970	Almy's Automobile Supply Co., auto parts salesman. Sold automotive service products, such as motors, chassis parts, tools, equipment, and chemicals to garages, service stations, and car dealers within specified territory. Called on established customers to obtain orders and interest customers in new lines of merchandise. Showed samples or descriptive materials of available products. Distributed display and advertising materials to customer.
1963 – 1964	DeWit's Men's Clothing Store, shoe salesman. Fitted and sold shoes, boots, and other footwear. Ascertained customers' shoe size or measured customer's foot on measuring device. Obtained footwear of specified style, color, and size from stock.
1960 – 1963	Tack's Hardware Store, salesman and cashier. Showed and demonstrated merchandise to customers. Rang up sales on cash register and bagged merchandise for customer. Occasionally assisted in conducting inventories of merchandise.
1958 – 1960	Military Service

Hobbies:

sports (golf, bowling)

References:

William Tack, Owner
Tack's Hardware Store
17 Main St.
Westboro, New York
212-223-4567

Anthony Almy, Owner
Almy's Automobile Supply Co.
911 Central Street
E. Grapefruit, New York
212-223-5667

ACME FOODS

Name ______________________________ Telephone ______________
(Please Print)

Address ____________________________ Full Time ____ Part Time ____
(Position Wanted)

____

____________________________________ Soc. Sec. No. __________

Hours Available ____________________ Have you any physical disabilities? ____
days *nights*

Are you presently employed? __________ By whom? ______________

What was your last job? ________________________________

Have you served in the Armed forces? ______ Type of Discharge ____________

Do any of your friends or relatives work for ACME? ______________

Have you ever worked at ACME? ________ Date Left: ______________

Highest grade completed in school. ________ Do you own a car? __________

Have you ever worked in a supermarket or warehouse? ______________

__________ *Date* __________________ *Applicant's signature*

Date of Interview ____________________

Interviewer's Comments ______________________________

____

____

____

____

____

____

INSTRUCTIONS TO STORE MANAGER:

1. This card is used as a preliminary application in a screening interview.
2. After the applicant is hired this card serves as the employee's record for your store files.

THE LIFE HISTORY OF JAY STRONG: AN AUTOBIOGRAPHY

I was born on New Year's Eve in the year 1944. Meson, Wisconsin, the town I was born in, was and is right in the middle of dairy country. My father worked in a nearby dairy as a cattle buyer. My mother was occupied full-time caring for me and my four brothers and sisters. I went to the local elementary and junior high schools. When I was old enough to ride a two-wheeled bicycle, I acquired a paper route from my older brother. This job I held until I graduated from Jameson High School in 1962. In my spare time, I used to (and still do) build model cars and airplanes.

While I was in high school, I decided that I didn't want to go into the dairy business, but would rather work in the city on a job working with people. My high school guidance counselor suggested that I might be interested in becoming a salesman; I decided to try it out for a while. My first job was with Bailey's Furniture Store. I didn't start out as a salesmen, though; I started out as a cashier. I worked as a cashier from 1962 – 1963. Fred Bailey, the owner, told me he liked my work and offered to train me to be a salesman. I went into training in 1963 and from 1963 – 1966 I worked as a salesman for Bailey's Furniture Store. In 1965 I got married to Linda Brown (we now have three children). Partly because of my marriage (my income needs increased) and partly because there was no room for advancement at Bailey's, I decided to look for another job. In addition, although I liked selling, I didn't especially like selling furniture. After looking for a while, I finally found a job at a large department store as salesman and floor supervisor. Part of the merchandise on the floor I was assigned to was furniture so I was able to use my past experience as a furniture salesman. I worked at this job with Ledman's Department Store before I again became dissatisfied and decided to look for another job. This time I knew that it was selling I wanted but with more independence and opportunity for profit than I had had in my previous two jobs. Additional income was also important because we then had two children and were looking for a house to buy. I decided to look for a job as an insurance representative, partly because I knew that if I were successful I could become an independent insurance broker. With good recommendations from Fred Bailey and John Ledman, my two previous employers, I managed to get a job with the Life Saver Insurance Company. I have worked for Life Saver Insurance Company for the past five years. My increased income has allowed me to buy a new home at 65 Thayer Street, where my family and I still live.

I am currently looking for a job as an insurance sales representative with a larger company. I would be available for work two weeks after I'd been notified of being hired at a new company (I have to give Life Saver Insurance Company two weeks' notice.)

JOB APPLICATION FORM

PLEASE PRINT

Name: ____________________

Address: ____________________

Telephone No.: ____________ Birth Date: ____________

Marital Status: ___ single ___ married ___ divorced ___ widowed ___ separated

___ engaged

Number of children: ______

Education: Degree: ____________ Date: ____________

WORK EXPERIENCE (in chronological order, most recent job first):

Employer	Job Title	Dates Worked

REFERENCES:

1. ____________________
name
____
street
____
city *state*

2. ____________________
name
____
street
____
city *state*

HOBBIES: ____________________

____

EMPLOYMENT OBJECTIVE: ____________________

____

DATE AVAILABLE FOR WORK: ________

III. Applicant Needs to Know

Instructions

The purpose of this exercise is for you to identify what you need to know about the job for which you are applying.

1. Working with your group, imagine that you have several job interviews arranged. The work involved in each job will be the same. How will you decide which job to take? What characteristics of the job will be important to you?
2. Appoint a notetaker for your group.
3. Working with your group, list all the job characteristics that you can think of that will help you decide which job to take.
4. When you have completed your list, the class will be brought back together to share their results.

ACTIVITY D: *The Interview*

I. Employer and Interviewee Responsibilities

Instructions

Up to this point you have looked at the kinds of things a job seeker has to do before he/she actually attends a job interview. In this activity, you will analyze a sample dialogue to learn what kinds of information are sometimes left out during an interview by either the employer or the applicant. Then you will have a chance to practice your interview skills.

1. Read the Dialogue and the two Profiles. The Dialogue is a job interview between an employer, John Goodland, and an applicant, Bob Casper. The profiles contain additional information about the employer and applicant.
2. Note the information that is missing in the dialogue, e.g., Does Bob neglect to tell the employer anything? Does the employer mislead Bob about anything?
3. When you have finished, you will discuss what is missing and try to find the reasons why in a class discussion.

EMPLOYER AND APPLICANT INTERVIEW DIALOGUE

Employer (John Goodland): Hello, I'm John Goodland, General Manager of the supermarket.

Applicant (Bob Casper): Hi. I'm Bob Casper.

Goodland: I understand you're looking for a job.

Casper: That's right.

Goodland: Have you ever worked in a supermarket before?

Casper: Not formally, but I used to help out in my father's grocery store.

Goodland: Have you any previous work experience?

Casper: The only job I've had is a paper route that I've had for the past three years.

Goodland: That's all right. No previous work experience is required. Do you have any references?

Casper: Two of my high school teachers: Miss Jones and Mr. Harris.

Goodland: Did you graduate from high school?

Casper: Yes.

Goodland: Do you have any questions about the job?

Casper: Yes. What is the starting pay?

Goodland: $1.70 an hour.

Casper: What does the job involve?

Goodland: Helping to unload trucks, placing stock on the shelves, marking prices and keeping records on stock delivered to the store.

Casper: What are the hours? Is overtime required?

Goodland: The hours are 8 to 4 and overtime is sometimes required.

Casper: I have no other questions.

Goodland: When can you start work?

Casper: Right away.

Goodland: Good. Are you interested?

Casper: Yes.

Goodland: I'll check your references and if they're OK you can start work Monday morning. You'll hear from me before then.

Casper: Thank you. Good-bye.

Goodland: Good-bye.

Role Profiles

Employer Profile – John Goodland

John Goodland is the General Manager of the Have-Some Supermarket. He is currently looking for a new stock boy to replace Jim who quit last week. The starting pay is $1.70 an hour. The tasks on the job are helping to unload trucks, placing stock on the shelves, marking prices and keeping records on stock delivered to the store. The job requires lifting a lot of heavy boxes; as a result there is high turnover among stockboys. Overtime is frequently required. New employees earn two weeks vacation per year. The supermarket pays the premium for employees' health insurance. He is about to interview Bob Casper for the job.

Applicant Profile – Bob Casper

Bob Casper has just graduated from high school and has no previous work experience except for a paper route. He has been looking for a job in a supermarket or grocery store for some time (He used to help out in his father's store after school). But he has been having difficulty because he is looking for a temporary job. He only needs a job for eight weeks because he has a summer job as a camp counselor already lined up and the counselor's job starts in eight weeks. He is about to have an interview for a position as a stockboy at the Have-Some Supermarket.

II. The Interview

Instructions

1. You will work in pairs and role-play to practice interview skills.
2. Each student will have an opportunity to play both employer and applicant.
3. Decide who should play employer and applicant first.
4. Read your role profile.
5. Take fifteen minutes to complete the interview.
6. When the first interview is finished, switch roles, using new role profiles. Follow the same procedure as above.

Role Profiles

Employer

The Drums **Book Store** **Opening: Manager**

You are about to play the role of Terry Osler, owner and manager of The Drums, a neighborhood book store. You are about to open a branch store across town and are looking for a manager for the new store. You are going to interview someone for the job.

The new manager's duties will include ordering books from publishers, making certain there are enough books in stock, supervising and hiring staff, and maintaining and reviewing the financial statements. In addition, because this will be a small store, the manager will sometimes have to sell directly to the customers. You are looking for someone who can perform all these functions and who is willing to work many long hours. The store will be open from 9 a.m. to 8 p.m. When the store is first opened the manager may have to be in the store, or on call, as long as it is open.

The starting salary for this position is $12,000. Opportunities for promotion are good; the manager can work towards making this branch grow, and eventually open new branch stores or perhaps even become a partner in the company. The Drums does not have health insurance coverage for its employees. It does, however, have a vacation plan: two weeks the first year of employment, three weeks the second year, and four weeks the third year and thereafter. No traveling is required on the job. You are looking for someone with management experience in the retail industry.

During the interview, you will first try to put the applicant at ease. You will then ask him what previous jobs he has had, what his educational level is, what his job and other interests are, and whether he has any references. If he has experience in management in the retail industry, seems interested in the job opening and has references, continue the interview by asking him/her if he/she has any questions about the job or the company. Once you have answered all his/her questions (based on the information provided to you above), terminate the interview by telling the applicant that you will contact him/her once a decision has been reached.

Applicant

The Drums **Book Store** **Opening: Manager**

You are about to play the role of Dana Johnson, job applicant. In the role play, you will be interviewing for a job as manager of one of the branches of The Drums, a bookstore. You are currently employed as assistant manager of the Grow-It Florist Shop. You are looking for a new job because there is not enough opportunity for advancement. You like the idea of managing a store, and don't really care what kind of product is sold. Your work history is as follows (chronological order, most recent job first):

- 5 years, assistant manager, Grow-It Florist Shop
- 1 year, salesperson, Homes Furniture Company
- 2 years, salesperson, Wilson's Book Store

Mr. Wilson, the owner of the book store and Mr. Gordon, the owner of the florist shop would be glad to provide job references for you.

You had enjoyed being a salesperson, but found, once you moved into management, that you liked management better. You like the increased responsibility and, of course, the increase in salary.

Once Terry Osler, the interviewer, has finished asking you questions, you will have a chance to ask some questions of your own. For example, what the job tasks and responsibilities are, what the hours of the job are, whether travel is required, what the fringe benefits of the company are, and what the salary for the job is.

Once you have all your questions answered, tell Terry Osler whetner you are really interested in the job. When he/she terminates the interview, thank him/her for her/his time and say goodbye.

Employer

Safe, Inc. **Insurance Company** **Opening: Insurance Sales Representative**

You are about to play the role of Chris Haskins, Personnel Director of Safe, Inc., insurance company. As Personnel Director, you will interview a candidate for the job of insurance sales representative.

Safe, Inc. is a medium-sized but growing insurance company which has recently begun to sell to residents of this area. It is seeking to employ five new sales representatives to establish the company in this relatively new territory. The company offers excellent fringe benefits, some of which are a very generous health insurance plan and a good vacation program (two weeks the first year, three weeks the second year and four weeks the third year and thereafter).

The tasks and responsibilities of the job are:

- to sell insurance to new and present clients
- to compile lists of prospective clients to provide leads most likely to produce additional business
- to contact prospects to persuade them to purchase a policy
- to explain the features of the policies offered
- to calculate rates to be applied to policies for each prospect.

The salary is $10,000 per year plus commissions. Each salesman sets his own hours based upon when his clients or potential clients are available to be seen. No travel outside this local territory is required. Safe, Inc. is looking for personable, aggressive young people as sales representatives. The company believes it offers sales representatives a chance to earn a great deal of money, if they're good at selling. Experience in insurance is desirable but not necessary. General experience in selling is adequate.

During the interview, you will first try to put the applicant at ease. You will then ask him/her what previous jobs he/she has had, what his/her educational level is, what his/her job and other interests are, and whether he/she has any references. If he/she has experience in selling and/or insurance, seems interested in the job opening and has references, continue the interview by asking him/her if he/she has any questions about the job or the company. Once you have answered all his/her questions (based on the information provided to you above), terminate the interview by telling the applicant that you will contact him/her once a decision has been reached.

Applicant Profile

Safe, Inc. **Insurance Company** **Opening: Insurance Sales Representative**

You are about to play the role of Lynn Henderson, job applicant. In the role-play, you will be interviewing for a job as insurance sales representative with the Safe, Inc. insurance company. You are currently employed as office manager for White's Stationer Supply Company, a job which you have held for four years. You are looking for another job, preferably in sales. Your brother-in-law is an insurance sales representative, and from his description of his job, you think you would like the work. Several years ago you had a job selling and really enjoyed it. You changed jobs only because you had received an excellent offer from White's Stationers both in terms of salary and increased responsibility.

Your work history, then, looks like this (most recent jobs first):

- 4 years, office manager, White's Stationer's Supply Co.
- 3 years, floor manager, Green's Department Store
- 3 years, sales person (apparel), Green's Department Store

The manager of Green's Department Store and the owners of White's Stationer's Supply Co. would be glad to give you references.

You went to junior college for two years and graduated with a major in business. You then got a job as salesperson for Green's Department Store, which you enjoyed. But after your promotion to floor manager you became dissatisfied because you were no longer selling and your contact with customers was minimal. When you were offered a job as office manager for White's Stationer's Supply Co. you took it because the salary was higher, because you'd be working with people, and because you'd be working more independently than you had as floor manager. Now you want to get back to selling and combine selling to customers (working with people) with independence on the job. It seems that the job as insurance sales representative would provide that opportunity.

Once Chris Haskins, the interviewer, has asked his/her questions, you might ask him/her some questions of your own. For example, what the job tasks and responsibilities are, what the hours of the job are, whether travel is required, what the fringe benefits of the company are and what the salary for the job is.

Once you have all your questions answered, tell Chris Haskins whether you are really interested in the job. When he/she terminates the interview, thank him/her for his/her time and say good-bye.

ACTIVITY F. *Holding A Job*

Instructions

The class has discussed together employer and employee dissatisfaction and why people leave jobs. You will now look at some specific cases to determine the impact on employer, employee and colleagues of bad working habits.

1. Work in small groups.
2. Read each case and work as a group in answering the questions at the end of each case. Note down your answers.
3. When you have finished you will discuss the cases with the class.
4. The chart, *Why People Leave,* lists some general causes for people being fired from or leaving jobs. What specific examples from the mini-cases fit under these general reasons?

Case Studies

The Bayview Hotel is about to host a convention with 300 participants. For the first luncheon they have assigned 20 waiters and waitresses. At the time of the luncheon only 18 waiters arrive on time. The other two waiters are an hour late. What implications does this have for the participants in the convention? What implication does the two waiters' lateness have for the rest of the waiters? What implication does the lateness have for the hotel?

On Saturday, the busiest day of the week, Jones' Grocery Store, a small neighborhood store, usually has two employees in addition to the owner, Mr. Jones. One Saturday, one of the employees (the cashier) didn't arrive and didn't call in to say he would be absent. What does this mean for the customers of the store? What did this mean to the remaining employee? What did this mean for Jones' Grocery Store?

There is a rule at Alfred's Gas Station that smoking is permitted only in the customers' waiting room. John, one of the employees, was found smoking near the gas pumps. Alfred, the owner, reprimanded John and asked him to put the cigarette out. John got angry with Alfred. Why do you think the rule existed? Should John have gotten angry with Alfred?

James Mason went into Bill's Auto Repair Shop to have his brakes checked. He was told that he needed a brake job. The brakes were fixed. Three weeks later, James' brakes let go in the middle of heavy traffic. James went back to Bill's Auto Repair Shop and complained. He found out that a new man had done the brake job on his car. What implications does this have for Bill's Auto Repair Shop? What does the faulty work mean to the customer? What does it mean for the man who did the work?

An employee in Gray's Department Store was told by his supervisor that he should get identification from customers who wanted to pay by check. The employee complied and when one customer wanted to pay by check, the employee took her driver's license as identification. When the employee finally found the supervisor to approve the check, the supervisor said that he had wanted two identifications. What implications does this have for the customer and other customers who might be waiting? What does this say about the supervisor's original instructions? What does this mean for the employee?

WHY PEOPLE LEAVE

REASONS PEOPLE ARE FIRED
(Employer's Point of View)

- continually late for work
- lacks skills to do the job
- can't or won't follow directions
- doesn't get along with co-workers
- dishonesty (e.g., shoplifting)
- doesn't follow company rules
- excessive absenteeism
- trouble maker

REASONS PEOPLE LEAVE JOBS
(Employee's Point of View)

- salary too low
- inconvenient hours
- displeasure with type of work
- displeasure with supervisor
- displeasure with co-workers
- no promotional opportunities
- location
- better opportunity arises

UNIT 16. CAREER PLANNING

Student Materials

OVERVIEW

ACTIVITIES	MATERIALS
A. *Developing a Career Plan*	
Develop an individualized career plan.	Career Planning Scheme A; Career Plan

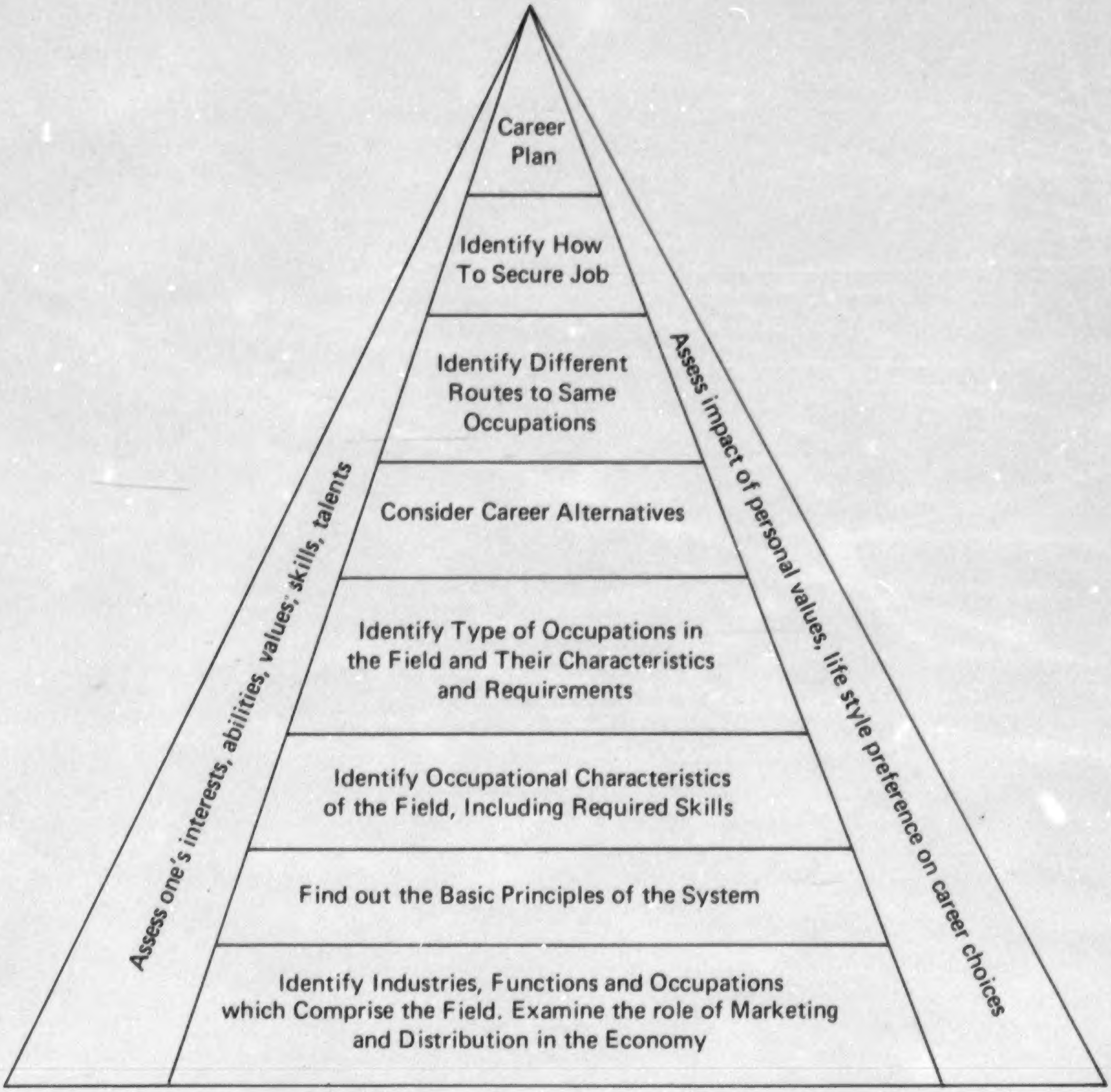
ACTIVITY A. *Developing A Career Plan*

Instructions

You now have an opportunity to develop your own career plan. This is a plan which you will use as much by changing it as by following it. Think of this as a working document which you will use throughout your life. Review it as your interests and abilities grow and change. Remember that your ability to prepare a career plan will last longer than the actual plan itself.

1. Review the Career Planning Scheme included in these materials to refresh your memory of the concepts you have learned and how they become a part of the career plan.
2. Fill out the plan. Your teacher will give you enough time to finish it, so work carefully.

CAREER PLANNING – SCHEME A


Career Plan
Identify How To Secure Job
Identify Different Routes to Same Occupations
Consider Career Alternatives
Identify Type of Occupations in the Field and Their Characteristics and Requirements
Identify Occupational Characteristics of the Field, Including Required Skills
Find out the Basic Principles of the System
Identify Industries, Functions and Occupations which Comprise the Field. Examine the role of Marketing and Distribution in the Economy
Assess one's interests, abilities, values, skills, talents
Assess impact of personal values, life style preference on career choices

CAREER PLAN

A. Career Objective: ____
(job title)

B. Preferences

The following are preferences you *may* consider in thinking about your career objective. Fill in where appropriate.

I want to:

a) work in ______________________ (For example, advertising or hardware)
(industry)

b) perform the job of ____________ (For example, selling space, or hardware)
(specify)

c) work in a company whose size

_____ large _____ medium _____ small

_____ doesn't matter

d) live in

_____ metropolitan area _____ average size city

_____ small town _____ doesn't matter

_____ rural area

e) work

_____ alone _____ with people

f) _____ be supervised _____ supervise others

g) live in a specific geographical area
(e.g. East Coast, New York City) ______________________________
(specify)

h) become an entrepreneur

_____ Yes _____ No

CONTINUED ON NEXT PAGE

C. Education and Training

List the education and training required to attain your job objective. Include courses which will be taken, the estimated time required to complete each, likely resources for obtaining each, and reason for obtaining each (e.g. college degree is required or to obtain bookkeeping skills)

Education and Training	Courses	Estimated Time	Resource	Reason

D. Work Experience

List the work experience, in sequential order, which you plan to undertake in order to achieve your ultimate job objective.

Job	Estimated Time	Type of Business	Experience to be Gained

E. Additional Considerations

List any other considerations which may affect career plan. For example, some female students may plan to leave the workforce during child-rearing years.

Consideration	Reason

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